



August 26, 2024

TO: ALL BIDDERS UNDER RFQ 24-3003840

FROM: Department of Purchasing and Contracting, DeKalb County, Georgia

ADDENDUM NO. 1

Request for Quotes (RFQ) No. 24-3003840 Document Management Solution, is hereby modified as follows:

1. The deadline for quotes has been extended to August 28, 2024, at 5:00pm.
2. We have received the following questions pertaining to this RFQ. The questions and responses are below:

1.	<p>(Q1) Is the focus of this RFQ to get an electronic signature platform or to implement a robust document and records management solution? The RFQ reads as though the emphasis is for electronic signatures and a cutting-edge document management solution is secondary. Please clarify.</p> <p>☑ The focus of this RFQ is to secure an electronic signature platform with a robust document and records management solution. The solution should also have a capability of automating workflows.</p>
2.	<p>(Q2 & Q3) Do all your documents require legally binding signatures? If not, would a solution that integrated a signature platform whereby only the documents that required a legally binding signature use that platform work for your needs? The variable costs associated with 90+ electronic forms can get pricey on a cost per envelope basis. However, once a Forms Process is built out in a traditional document management system, the functionality allows for unlimited signatures; there is no additional cost each time you use that form. This type of integration typically is a less expensive option which provides a more robust solution with fixed costs for which you can accurately budget.</p> <p>☑ Yes. All of our forms will require legally binding signatures.</p>
3.	<p>(Q4) What is the average length of the form you want converted into a forms process? Or do you have a breakdown as to the number of 1-page forms, 3-page forms, 6-page forms, etc.?</p> <p>☑ The average form length is 1-3 pages.</p>
4.	<p>(Q5) Can you provide samples of the types of forms to be converted? (Q53) Can you provide examples of the types of HR forms you intend to include in this project? For example, HR onboarding, personnel action requests, etc.</p>

	<p>☐ Samples will be provided to the awarded vendor. Form examples include common HR documents such as Form I-9, DOL Separation Notice, FMLA and other onboarding and acknowledgment forms.</p>
5.	<p>(Q6) Approximate number of employees in the HR & Merit System department? (Q10) How many users will be using this Document Management Solution? (Q32) How many users will there be? (Q49) How many employees will be tracked in the document management solution? (Q64) Does your organization desire Single Sign-On capability?</p> <p>☐ The HR & Merit System department has 15/45 employees who will require single-user licenses upon implementation with SSO. HR will distribute forms for signature for up to about 6,500 county employees.</p>
6.	<p>(Q65) Will there be a need to enable multiple teams with overarching administration capabilities?</p> <p>☐ No</p>
7.	<p>(Q57) How many users do you want to be trained on building out forms and workflows?</p> <p>☐ Approximately 5 users</p>
8.	<p>(Q11) Is there a migration of documents/data needed? If so, what applications? (Q12) What is the total number of documents to be migrated? (Q13) What is the total storage size of the documents to be migrated? (Q38) Is the goal only to migrate the ~90 existing forms to the new platform, or are there other documents to be migrated?</p> <p>☐ Our intent is not to migrate completed data. The goal is to migrate 90 blank forms/templates to the new system. Storage size is unknown.</p>
9.	<p>(Q14) For future growth, how much additional storage do you anticipate needing annually?</p> <p>☐ No storage cap. Unlimited. This number is yet to be determined.</p>
10.	<p>(Q15) What is the total number of unique document types? (Q39) <i>If there are other documents</i>, please provide the approximate number, types, and current repository.</p> <p>☐ All common document types currently used in a business environment. See scope.</p>
11.	<p>(Q17) Can the County clarify the requirement “Automatically detecting certain types of boxes, lines for signatures, or areas that require typical user interaction and then automatically placing the correct type of electronic input field accordingly. This functionality helps expedite the placement of fields in a document uploaded into the software.”? Perhaps a use case?</p> <p>☐ Automatic field detection on forms refers to technology that automatically identifies and labels fields within a form. This often involves the use of optical</p>

	<p>character recognition (OCR) and machine learning algorithms to recognize text, checkboxes, dropdowns, and other form elements without manual intervention. For example, if the form has a first name field, the system should be able to detect that and apply the appropriate field type (text, checkbox, etc.) and label the field type “First Name” to expedite the form-building process.</p>
12.	<p>(Q18) Can you further expand on the definition and role of the administrator and specialist/processor? How are they different? How frequent of users of the system do you suspect they will be (Full-time or occasional)?</p> <p><input checked="" type="checkbox"/> The Administrator is responsible for overseeing and managing the overall system. This includes setting up user accounts, managing permissions, configuring system settings, and ensuring the system operates smoothly. Administrators handle high-level tasks such as troubleshooting. Specialists or Processors use the system to handle specific tasks related to their roles. This may include processing forms, managing data, or carrying out specialized functions within the system. They focus on executing and managing day-to-day operations based on their expertise.</p> <p><input checked="" type="checkbox"/> Key Differences: Administrators manage the overall system, settings, and act as Tier 1 tech support, while Specialists/Processors focus on executing specific tasks like form building and data management.</p> <p><input checked="" type="checkbox"/> All users will utilize the system daily.</p>
13.	<p>(Q20) When does the County anticipate to begin project implementation? (Q21) When does the County anticipate to go live with the new solution? (Q29) Is there a desired go-live date for the document management system?</p> <p><input checked="" type="checkbox"/> The HR department plans to go-live mid-September 2024.</p>
14.	<p>(Q22) Is there a phasing plan for the project to cover different departments and aspects of the solution? If so, can this please be shared? (Q74) In regard to future use of the proposed document management system, do you anticipate other departments using this same system?</p> <p><input checked="" type="checkbox"/> At this time, HR is the projected user.</p>
15.	<p>(Q24) Section 2, scope of services, mentions 90 forms annually. Is the expectation that the selected vendor will implement all 90 forms OR will DeKalb County go live with a subset of the 90 forms? If DeKalb County goes live with a subset of forms, please provide the names of the forms and a brief description of the forms.</p> <p><input checked="" type="checkbox"/> The expectation is that the selected vendor will implement all 90 forms, no subsets.</p>
16.	<p>(Q25) Section 2, scope of services, mentions “improving convenience for applicants.” Are you looking for a system where applicants will submit applications for positions which will also manage the applicant to employee lifecycle?</p> <p><input checked="" type="checkbox"/> No. The phrase “improving convenience for applicants” pertains to enhancing accessibility to all of our forms (hiring forms, acknowledgment</p>

	<p>forms, leave forms, etc.). According to the scope, the solution must include a user-friendly interface, be compatible across various devices and operating systems, and ensure dependable performance with an uptime of over 99%. This will enable users to sign documents anytime and from anywhere.</p>
17.	<p>(Q16) How many workflow routing rules do you have? Which ones make updates to your business\SIS apps?</p> <p>(Q26) Section 2, scope of services, mentions unlimited number of workflows. <i>For the initial implementation/go-live, how many workflows are required?</i> Please provide some details for each workflow (i.e. routing process, user groups, actions, etc.).</p> <p>(Q63) What is the workflow requirement for these documents (if multiple use cases, please include the workflow for each)?</p> <p>☒ Number of workflows is unknown as it varies per form. The workflow is initiated when the user accesses the form and completes the electronic signature process. The form is then routed to the next signer assigned in the workflow until all signers in the signing order have applied their signature closing the workflow. Once complete, the final copy is emailed to all parties for record-keeping purposes and the original copy is stored in the document library.</p> <p>Different forms have different approval processes. Some HR forms call for multiple signatures. The vendor's product should facilitate the development of an automated workflow in which, upon completion by signer A, the form is automatically transmitted to signer B, who can either sign and forward it to signer C or return it to signer A. If signer B chooses to proceed, the form is sent to the next signer, and so on, until the workflow is complete. Should one party delay the signing procedure, the software should automatically send a signature reminder email until the form is signed.</p> <p>In conclusion, some HR forms are more complex when it comes to collecting signatures, so we need a software that is flexible enough to support conditional signers and automated workflows to reduce human error and support a hybrid workforce.</p>
18.	<p>(Q27) Section 2, scope of service, mentions “setting document expiration dates for different document types...”. Can you please provide a breakdown of retention rules by document type?</p> <p>☒ If a form has a submission deadline, the solution should include a feature that allows form builders to set an expiration date for said form, automatically preventing any submissions after the deadline. (i.e. forms, surveys, polls, etc.)</p>
19.	<p>(Q28) Section 2, scope of services, mentions “training to be provided within one week of installation of the system.” What is the expectation regarding the <u>level of training</u> within one week of installation? What are you looking to learn during the training? Is the intention for DeKalb County to be able to configure the platform based on the initial training?</p>

	<p>☒ Within one week of installation, administrators should gain a foundational understanding of the system's layout, how to access key features, and its functionality in addition to how to use the newly migrated documents and forms within the new solution. Users should also gain an understanding of user roles and how to manage access or permissions. The goal is to be able to confidently perform routine tasks and begin using the system effectively within a short time frame. Please be sure to indicate the number of training hours provided.</p>
20.	<p>(Q30) Do you require the employees to log into the document management system to complete and maintain employment-related documentation?</p> <p>☒ End-users/document submitters should be able to initiate the signing process with no login. Logins are only required for licensed users.</p>
21.	<p>(Q31) Do you have an existing HR platform today like ADP? If so, is there a need to integrate the existing HR platform with the new document management platform?</p> <p>☒ Yes, the county uses Oracle HCM. Integrations with either of these systems are preferred but not required: Microsoft Office (including SharePoint), Adobe applications, and Oracle HCM Cloud 23C</p>
22.	<p>(Q34) How many internal users are expected to initiate electronic signatures? (Q62) How many users need access to send documents?</p> <p>☒ Unlimited end-users should be able to initiate signature workflows without needing to sign in.</p>
23.	<p>(Q35) How many documents (approximately) do you need to electronically sign annually? (Q36) What is the approximate volume of documents to be stored? (Q61) How many documents will be transacted on an annual basis?</p> <p>☒ Section 2, scope of services, indicated ~90 existing forms generating approximately 10,000 transactions annually.</p>
24.	<p>(Q37) Can you provide more information on the scope of the work for the conversion and load of your existing documents and forms into the new solution?</p> <p>☒ Convert and load existing blank documents and forms into the new solution means taking all current digital forms and documents, transforming them into a format compatible with the new system, and then transferring them into the new platform. This process ensures that all existing documents are accessible, usable, and integrated within the new solution for continued operations.</p>
25.	<p>(Q40 & 41) Apart from the ~90 existing forms, which will need to be converted to the new system, are there any other documents requiring conversion, or will any other document simply be loaded as-is? (For clarity: standard file formats such as Office/PDF documents or images using common formats (e.g. TIFF, JPEG, GIF...) can usually simply be loaded as-is without any processing or conversion. However, non-standard documents such as proprietary formats or</p>

	<p>raw/structured data stored in databases will usually require some processing to convert them to a standard file format before importing).</p> <p><input type="checkbox"/> No other documents require conversion apart from the existing ~90. Any new documents/templates will be loaded as fillable forms that capture the required information.</p>
26.	<p>(Q42) Do you expect the vendor to convert the ~90 forms to the new system, or do you expect the new forms to be built by your staff with support from the vendor?</p> <p><input type="checkbox"/> The expectation is for the vendor’s implementation team to import and convert the ~90 forms to the new system. Once the forms are established, the County will configure the workflows.</p>
27.	<p>(Q51) Of the approximate 90+ forms currently distributed by HR, can you provide an estimate of the amount coming from each source? For example, there are ‘XX’ web forms coming from SeamlessDocs, etc.</p> <p><input type="checkbox"/> Approximately, 80 documents, 10 webforms. HR cannot disclose the source.</p>
28.	<p>(Q43) Integrations, modern APIs</p> <p>a. <i>Yes, we can do integrations with Oracle and Office but we would like to know is do you have anything specific in mind?</i></p> <p>b. <i>This is not out of the box feature but we can extract data from an Oracle database.</i></p> <p>c. <i>Is there something you could share at this point as far as specific requirement or use case?</i></p> <p><input type="checkbox"/> The County uses Oracle HCM and FMIS eBusiness. It would be preferred for employee digital records to be uploaded into Oracle HCM. The software should be capable of importing and exporting files in mass and individually through an automated process to facilitate seamless data migration.</p>
29.	<p>(Q44) Unlimited Cloud Storage</p> <p>a. We can provide “unlimited” storage since our platform runs on AWS but it will come with additional cost.</p> <p><input type="checkbox"/> The preferred solution will offer unlimited storage as part of the service at no additional cost.</p>
30.	<p>(Q45) PDF Form Builder</p> <p>a. The SkAIForm Builder is better and more powerful than just a PDF. The data that are captured goes directly into your database that can be easily tracked and managed.</p> <p>b. The form can be exported to a .pdf file if necessary.</p> <p>c. SkAIForm Builder allows you build in business rules in enforce governance and security.</p> <p>d. Would you like us to demo it prior to reviewing the contract?</p> <p><input type="checkbox"/> Yes. Demos will be requested as needed by shortlisted bidders deemed most responsive/responsible by Purchasing.</p>

31.	<p>(Q46) Signatures and Delegation: UKG is an HR focused vendor. Our solution is a great fit for setting up Ticketing workflows for HR Issues, Setting up Forms that capture data for specific HR processes + Document Organization, Document Generation, Document Storage, Audit Compliance and satisfying Legal Requirements for document retention. However, the RFP mentions that you also need signature workflows. This will require an integration with a third-party product, either Docusign or Adobe Sign, since either of these solutions offer the ability to sign as well as delegate. Is DeKalb County ok with this approach?</p> <p><input type="checkbox"/> No.</p>
32.	<p>(Q47) Under Scope of Services, it is mentioned: “The vendor should provide support hours to assist with any form build-out when requested. Therefore, the proposed vendor will be an all-in-one, cost-effective solution.” UKG is a software platform only, and, while we do offer limited consulting services to get customers enabled and operational, we refer our customers to consulting partners to provide more of the day-to-day operational support. Is DeKalb County ok with this approach?</p> <p><input type="checkbox"/> No.</p>
33.	<p>(Q48) Is there flexibility on these requirements? 1) Ability to embed forms in other webpages 2) Ability to search these forms and documents by form name, signer name, etc.</p> <p><input type="checkbox"/> No. These are core requirements.</p>
34.	<p>(Q52) The first bullet point under the core functionality/minimum requirements for Form Building states, “the ability to export into a number of formats...” By “export”, does the County also mean “download” in this instance?</p> <p><input type="checkbox"/> Yes.</p>
35.	<p>(Q54) Can you list what API-compatible systems you want this solution to integrate with? If not, can you provide an estimate on the amount of API integrations you are seeking for this project?</p> <p>(Q55) Can you confirm that Oracle Cloud Human Capital Management is one of the integrations you seek?</p> <p>(Q56) Can you confirm that SharePoint is one of the integrations you seek?</p> <p>(Q66) What other software(s) would you like to integrate with your eSignature software?</p> <p>(Q67) Please describe which Oracle product you’d like to integrate. Please provide version information and/or any supporting workflow describing the high-level process (e.g. - will data flow to and/or from the Oracle solution, etc.)?</p> <p><input type="checkbox"/> Integrations with either of these systems would be preferred but not required: Microsoft Office (including SharePoint), Adobe applications, and Oracle HCM Cloud 23C, Oracle ERP Cloud (Financials), Oracle Planning and Budgeting Cloud Services, Oracle Fusion Development – Oracle Integration Cloud Service 3 (OIC 3). Ideally it should be a two-way communication, however, the integration is only preferred but not required.</p>

36.	(Q58) Since you prefer cloud-based solutions, could you please share details regarding data size? ☒ Data size is unknown. Storage size should be unlimited.
37.	(Q60) What are the use cases required of the HR Department for a Phase I deployment of eSignature? (examples include: Orientation documents, I-9, New Hire Paperwork, Benefits Documentation, Performance Reviews, Compensation Changes) ☒ Common use cases are orientation documents, federal forms, acknowledgment forms, leave forms, complaints, surveys, etc. with multiple signatures based on workflows.
38.	(Q68) Do you have a preference for cloud hosting, such as Azure or private hosting? ☒ No.
39.	(Q69) Have you seen demos from other vendors? ☒ No. The County reserves the right to request demos during the evaluation of the responses.
40.	(Q71) Core Functionality: Form Building -"converting common document types" - Are you looking specifically for a solution that can automatically convert a document such as a PDF to a fillable form? (Q72) Would it be acceptable to re-create or re-build the PDF as a fillable form? ☒ Yes. We are looking for a solution that can automatically convert a common document type like Word into a fillable form (or whichever proprietary file type required that captures the data) and exports/downloads as a PDF.
41.	(Q73) Core Functionality: Implementation and Support - Data migration - In which online document management system do these documents or existing forms currently exist? Approximately how much data? ☒ GovOS/SeamlessDocs
42.	(Q75) Do you have a preferred signature platform? ☒ No
43.	(Q7) Previous contracts or RFPs related to document management systems? ☒ Please submit your inquiry using the following link: Open Records Request - Purchasing DeKalb County GA
44.	Q8) Budgetary constraints or spending limits for this project? Q23) What is the County's budget for the project? ☒ \$36K for the first year.
45.	(Q9) Preferred payment terms or contract structures?

	<input type="checkbox"/> Invoice on net 30 terms.
46.	<p>(Q19) When does the County expect to make an award and/or complete contracting with the selected vendor?</p> <input type="checkbox"/> The County intends to determine if an award will be made as soon as possible. The needs for this service are immediate.
47.	<p>(Q33) Do all the vendors get the answers to all of the questions submitted?</p> <input type="checkbox"/> Yes.
48.	<p>(Q50) Can we extend the time frame to allow for a more detailed and thorough response? (Q70) Is it possible to request an extension?</p> <input type="checkbox"/> The due date has been extended to 8/28/24.
49.	<p>(Q59) Would you kindly inform us about the scheduled time for the demonstration?</p> <input type="checkbox"/> If demonstrations are requested, they will occur during normal hours Monday – Friday, 9:00 am – 4:00pm EST. Responders should be able to conduct demos within 24-48hrs of notice.

3. It is the responsibility of each responder to ensure that he is aware of all addenda issued under this RFQ. Please sign and return this addendum. You may email Stephanie Dupiton at t-srdupiton@dekalbcountyga.gov, before the responses are due to confirm the number of addenda issued.
4. All other conditions remain in full force and effect.

Procurement Technician
Department of Purchasing and Contracting



ACKNOWLEDGEMENT

Date

The above Addendum No. 1 to RFP No. 24-3003840 is hereby acknowledged:

(Name of Bidder)

(Signature)

(Title)