



MANDATORY PRE-PROPOSAL TELE-CONFERENCE

Enterprise Form Builder Platform

RFP No. 637938

Tuesday, April 18, 2017
10:30-11:30 AM CST

TRANSCRIPT

The purpose of this meeting is to provide a forum for vendors to obtain clarification about the RFP prior to preparing their responses.

Participants:

	<u>Supplier</u>	<u>Contact Name</u>	<u>Email</u>
1.	Versivo	Tim Mannel Lance Boyd	tim.mannel@versivo.com lance.boyd@versivo.com
2.	Lexmark ES / Jadu	Brendan Clark John Euston	Brendan.Clark@kofax.com john.euston@jadu.net
3.	Ricoh	Shawn Dees Clint Kordsmeier	Shawn.Dees@ricoh-usa.com Clint.Kordsmeier@ricoh-usa.com
4.	CDW	Dan Rice Matt Felvey	Dan.Rice@ricoh-usa.com matfelv@cdwg.com

UofA Team (present): Chris Nixon, Blake Chapman, Suzanne Kenner, Robin Carr, Dylan Hurd, Andrew Dorman

Procurement Coordinator: Whitney Smith, wesmith@uark.edu

Reminders / Clarifications

- **Be sure to sign all bid documents where required and submit with your proposal!**
- All participants on this call will receive the transcript which will include the information from the Q&A forum. Please make certain you have sent Whitney Smith an e-mail with your contact information (wesmith@uark.edu). Any questions related to the RFP that are received *after* the distribution of this Transcript will be addressed by Q&A Addendum and provided by email to all participants of the conference call of 4/18/17.
- **Arkansas Technology Access Clause:** As noted in the Standard Terms & Conditions Document for this RFP, found here <http://procurement.uark.edu/resources/documents/terms.pdf> (item #22 starting at the top of page 4), vendors are required to comply with this request by submission of a Voluntary Product Accessibility Template (VPAT) with their proposal.

Questions / Answers

- Q:** Whether companies from Outside USA can apply for this? (like, from India or Canada)
A: Non-US companies can submit RFP responses. The minimal expectation is that all communications occur in written and spoken English.
- Q:** Whether we need to come over there for meetings?
A: The expectation is that the consulting engagement will be an on-site event conducted at UA Fayetteville. If the respondent proposes an alternate venue they should indicate which activities will occur on-site and which activities will occur remotely.
- Q:** Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)
A: The expectation is that the consulting engagement will be an on-site event conducted at UA Fayetteville. If the respondent proposes an alternate venue, they should indicate which activities will occur on-site and which activities will occur remotely.
- Q:** Can we submit the proposals via email?
A: No
- Q:** What is the number of users in the system? How many will be building the forms vs just filling out the forms?
A: We don't have an answer for that. Approach is to go with smaller number of users for creators. Less is more. Approximate number of 12 creators. General ballpark only.
- Q:** How many forms are you looking to put into the system?
A: We have identified 1000s.
- Q:** What type of timeframe are you looking to accomplish? Develop all of them at one time or simultaneously.
A: Approach is similar to how we develop our web. Web creators will work with depts. to create forms as needed.
- Q:** Are these mostly existing paper processes or legacy forms. What are you doing now vs where are you looking to replace?
A: We want to replace every form that exists. Some are platform some are homegrown. Many issues around security, accessibility, etc. We will look at business processes and consider ERP coming forward.
- Q:** Fair to say that you are looking at initial phase as a replacement to any and all web forms and sweeping all those legacy forms together.
A: Yes
- Q:** Regarding the RFP in general, all of requirements are must haves, should haves. Should we take those literally? How are those accounted for in criteria? Define these.
A: Those are literal and on purpose. Mandatory requirements are those which we cannot budge on and should haves are things we like but not necessarily required.
- Q:** Do you envision a large difference in how depts. web forms look and feel will change based on depts. needs or are you looking for more consistent across the entire campus? Is there a need for deviation?
A: We are working more towards a unified look and appeal. 80% needs to be consistent. 20% may vary with colors, fonts. Etc.
- Q:** In Section 14.5.6 external digital signature solutions. Is UA using any digital signature solution?
A: There is no digital signature solution across campus at this time.
- Q:** Have you thought about a roll out schedule? Should our response be focused on your departmental roll out?
A: This has not been determined yet. We will have a form building solution but will do the initial development ourselves. We will facilitate the development with your assistance.
- Q:** Integration – Has your ERP provider been determined?
A: Not yet.

- Q:** When a form is created, what does the work look like on the backend? Document management repository that will kick off some type of workflow?
- A:** We are looking at minor workflow functionality. Database dump of form content. Workflows that are more of approvals and routings are bell and whistles. Majority of forms needed are based on a need to get just get data and that's it.
- Q:** Are you a banner shop?
- A:** No
- Q:** What student info system do you use?
- A:** PeopleSoft
- Q:** If we did a drop end form, where does it go?
- A:** Image Now is our repository. But that may change based on our ERP and considered a stand-alone solution.
- Q:** Hosted or on-prem?
- A:** We prefer a vendor hosted cloud solution.
- Q:** You talked about digital signatures, would you like to have that included as part of the answer?
- A:** Yes, if you have that option, please include it as an add-on option in the proposal.
- Q:** Are pre-built forms part of user base?
- A:** The ERP may take that roll.
- Q:** Do you have an idea from roll out how many forms will be needed for first dept. so that when we price that out we can price it based on the first 1000?
- A:** Hard to answer since we don't know what those first forms may be.
- Q:** Can you talk about security and HIPPA compliance requirements?
- A:** Good question – to air on the side of caution - Yes, we need have those compliances in place when you respond. Including FERPA and PCI if possible.
- Q:** So some will be public facing and some intranet?
- A:** Yes
- Q:** From a mobile experience, what would be your idea of the amount of time you would like to dedicate to training for the forms process?
- A:** One week maybe. Depends on how intuitive the forms tool. Depending upon the complexity of the solution.
- Q:** Do you have ability to host or is it your preference for hosting?
- A:** We prefer you to host.
- Q:** Do any forms have authentication on them now?
- A:** Vast majority or public, some are private.
- Q:** For forms that will require SSO, do you envision links to those forms will be linked to existing portal or how will users execute the form?
- A:** It will depend on the form. Our preference is Shibboleth. The ability to pre-populate the form based on authentication is with the scope of this project.