



Electronic Document Management System Solicitation Strategy

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Electronic Document Management Systems – Solicitation Strategy

7 Stages of Procurement

The State's procurement processes fall into the "7 Stages of Procurement", beginning when a State Entity first identifies a need for goods or services, and continuing through identifying existing suppliers, posting solicitations through the competitive bid process, and awarding and managing contracts.



ELECTRONIC DOCUMENT MANAGEMENT SYSTEMS – SOLICITATION STRATEGY

Stage 1 - Needs Identification

- Researched Supplier Market
- Release Request for Information
- Supplier Demonstrations

Stage 2 - Pre Solicitation

- Consider desired capabilities
- Identify Critical Business Requirements

Stage 3 – Solicitation Preparation

- Develop Solicitation Strategy
- Prepare a project schedule and confirm funding availability
- Determine network dependencies/GTA requirements



ELECTRONIC DOCUMENT MANAGEMENT SYSTEMS – SOLICITATION STRATEGY

Stage 4 - Solicitation

- Release procurement
- Address Supplier Questions

Stage 5 – Evaluation

- Score cost and written responses/ oral presentations

Stage 6 – Award

- Establish Contract

Stage 7 – Contract Administration

- Manage performance/ Service Level Agreement



Research Supplier Market

- Contact with State Agencies
- Internet Research
 - www.hrhero.com (general EEOC regulations for employment records)
 - Supplier's websites
 - Review Proposals from other governmental entities
- Professional Associations
- SHRM. Org
 - List of Document Imaging and Information Management Companies
 - Personnel Records Audit Checklist



Release Request for Information

- Invite Suppliers to respond through Team Georgia Marketplace (TGM)
 - NIGP categories for Human Resources Consulting and Employment Software
 - Send courtesy notifications
- Allow response time of 15-25 days



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- Compile and Compare responses



Supplier Demonstrations

- Compile and Compare responses
- Develop criteria for shortening the list of Suppliers to invite to demonstrate software
- Prepare presentation invitations to include topics and time limits
- Consider flexibility in allowing web-conference enabled presentations



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Business Related Objectives	Request for Information Topics
Capabilities for electronic document management of HR employment records	Software Capabilities for HR Employment Records (History and Experience)
Professional support available to assist with migration and verification of existing employment records (scope of historical and current to be determined)	Ranges of Services including System Support (technical) and Professional Support (consulting) Description of capabilities to migrate documents of various sizes and types (i.e. hand-written)
Intuitive record retrieval and redaction capabilities that can support Open Records requests	Examples of software capabilities to include OCR and intuitive description queries that are not static.
Compatibility with system network and within the extend of resources available to support ongoing utilization	Description of implementation expectations and network requirements to maximize performance. Average user profiles.
Management and organization of non descript payroll related information	Summary of software capabilities with descriptions of functionality.