

QUESTIONS PERTAINING TO CLAY COUNTY SHERIFF'S OFFICE DOCUMENT IMAGING AND MANAGEMENT SOLUTION RFP B16-001

1. Can the Sheriff's Office please send the detailed description of each approval process that they would like implementation with the initial deployment of the Document Management Imaging and Management Solution?

RESPONSE: Every form that we will want implemented has not yet been identified, however, the first 3 will be our employee action notification, purchase requisition and training request form. These forms are currently in a Microsoft Word or Excel format. The steps that we would like to be able to implement for each form are as follows:

a. Employee action notification: occurs when an employee is hired, separated, transferred, promoted, etc. HR member generates form and approval process starts

HR Director, CFO and Chief of Staff are the three levels of approval for this form

When the form is approved by the HR Director, a redacted version of the document (i.e. salary information and social security number removed) is sent to various departments (IT for computer access, Amory for weapon issuance, etc.) within the agency for action.

After the final approval, an un-redacted copy is sent back to HR and payroll.

b. Purchase requisition: Employee requesting purchase fills out the form in Excel, prints out, and sends it to his/her supervisor where it travels through the employee's chain of command until it is approved by the Captain and Major in that employee's chain.

The requisition is then forwarded to the Purchasing Director for review/approval and if the purchase has a single unit cost of \$1000 or greater (Capital Item), it also need the CFO's approval. If the total/single purchase is over \$10,000, then approval from the Chief of Staff or Sheriff is also required. After review and approval, the information on the requisition form is entered into the Financial System – Navision.

Pages of quotes and contracts/forms requiring approval and signatures often accompany the paper requisition and should be attached to the requisition.

DESIRED. We wish to have the employee requesting the purchase enter the appropriate information for the purchase, attach the necessary backup, and be able to select the supervisors that are required to approve the purchase due to the supervisory structure changing depending on the employee making the request.

Training request: When a training request is completed, approvals need to be at every level of supervision in the Chain of Command all the way to the Chief of Staff. Again, we wish this to a process in which the user can select/identify the proper chain of approvals since it will change depending upon the employee requesting training.

If the training requires money to be spent, then the CFO also needs to approve the request.

Once completed, our training section needs to be notified of the completion of approvals. Fiscal and Purchasing then needs to be notified to execute payment of training fees and arrange for lodging if there are travel requirements.

2. Can the Sheriff's Office please provide process diagrams for each of the approval processes that they would like implementation with the initial deployment of the Document Management Imaging and Management Solution?

RESPONSE: Refer to response to #1.

3. Please supply copies of all paper forms (for example, the purchase requisition form) that are currently being used in these business processes that may be replaced by the use of electronic forms.

RESPONSE: Three forms discussed in #1 are provided below as examples. The Purchase requisition form has drop down options to select codes and has embedded formulas to extrapolate costs for quantity times unit price as well as summation for total costs.

4. With the initial implementation of the Document Management Imaging and Management

Solution, does the Sheriff's Office need to integrate with all of these 3rd party applications: Ability to configure interfacing with 3rd party applications SunGard Public Sector / OSSI OneSolution RMS/JMS/CAD, Serenic Navigator? Or only one at first with the others added in phases?
RESPONSE: Desired for all at implementation, however, we are willing to be flexible within a reasonable time frame if a phased implementation would result in a better end product. Bidders should provide an implementation time table as part of their proposal.

5. There are many definitions for "integrate". What is the Sheriff's Office referring to when it states integrate with 3rd party applications? Do you want to be able to image enable these applications (which means be in the 3rd party application and retrieve documents associated to the data on the current screen for the document management solution)?

RESPONSE: Yes, imaging enabling.

6. For the initial department(s) that will be using the Document Management Imaging and Management Solution, how many users would be involved in scanning and how many scan stations do you anticipate needing?

RESPONSE: Scanning would be by the advanced users indicated in 5.2.1.4 of the RFP. Also in this section, it states to "provide concurrent user estimates based off these numbers." Bidders should use their experience to propose/advise the CCSO how many concurrent licenses we would need due to a majority of the 350 users would not be in the system at the same time. As you discuss below, most of the users would perform the approvals needed, then exit from the application.

7. Would these scan stations be attached to a Fujitsu Scanners? How many departments would need to scan from their existing Fujitsu Scanner and how many would use a multifunctional device for scanning?

RESPONSE: 2-3 of the approximately 35 would be limited to multifunctional device scanning only, the rest would use the current Fujitsu scanners.

8. The RFP states that approximately 600 total basic users for web application, of these 600 approximately 350 could be working at any one time. Does the Sheriff's Office want a licensing quote that would allow 350 users to be in and using the Document Management Imaging and Management Solution at the same time? The RFP stated that "A majority of working users would not be connected to the system at the same time".

RESPONSE: See Response to #6.

9. If workflow is going to be implemented, approximately how many of the 350 users that are working in the Document Management Imaging and Management Solution will need to be utilizing the workflow management in the solution at the same time? Users of workflow processes would only be those users that are actually doing approvals within the processes.

Usually this would be much less than the total amount of users in the solution at the same time.

Our experience with government agencies using workflow is that the users who are part of the approval processes are in the solution only long enough to make approvals and then exit out.

RESPONSE: See Response to #6.

10. With the initial implementation, what types of documents would be scanned into the system? Please provide a list of these different document types for each department. (Example: Incident Report, Crime Photo, Accident Report, Invoice, Purchase Order, etc.)

RESPONSE: Many, all that are listed in the question, plus fingerprint cards, witness statements, crime scene drawings, plus others that are not coming to mind at this time.

11. In the initial department(s), what information do you wish to capture about your documents? (Captured during the imaging stage – ex. Case Number, Offense Type, Address, Invoice Number,

Purchase Order Number, Vendor Name, Dates, etc.). In other words, if you were to search for your documents, what information would you find most useful to find them?

RESPONSE: Again, many, that would be determined by each department at set up.

12. Would the Sheriff's Office want the capability to perform full-text searching on certain document types?

RESPONSE: YES.

13. Is there an established budget for the purchase of the Document Management Imaging and Management Solution? If so, please disclose the amount budgeted.

RESPONSE: Bidders should provide a cost proposal based on the requirements and the entire proposal will be evaluated as discussed in the RFP.

14. Would it be possible to move the proposal due to of this RFP out a couple of days? The due date is right after the Thanksgiving holiday and there is very little time to get the proposal printed, assembled, packaged and have a courier service deliver it by Tuesday at Noon. Much appreciated.

RESPONSE: The due date will be extended to 12/8/15 at Noon.

CLAY COUNTY SHERIFF'S OFFICE

Clay County, Florida

PERSONNEL ACTION NOTICE

Name (Last, First, Middle)	Social Security Number	Employee ID Number	Date of Birth
Address (Street or P.O. Box)	Work Schedule	Bureau	Sex
	<input type="checkbox"/> Full Time	<input type="checkbox"/> Administration	<input type="checkbox"/> Male
	<input type="checkbox"/> Part Time	<input type="checkbox"/> Detention	<input type="checkbox"/> Female
City, State, ZIP	<input type="checkbox"/> Temporary	<input type="checkbox"/> Finance	Effective Date
		<input type="checkbox"/> Operations	
		<input type="checkbox"/> Sheriff's Staff	
Position From	Class Code	Position To	
Deputy Sheriff			
Annual Pay Rate		Annual Pay Rate	
Grade	Step	Grade	Step
Incentive		Incentive	
Nature of Action			
<input type="checkbox"/> Hired	<input type="checkbox"/> Merit Increase	<input type="checkbox"/> Retirement	
<input type="checkbox"/> Re-Hired	<input type="checkbox"/> Incentive Increase	<input type="checkbox"/> Termination	
<input type="checkbox"/> Promotion	<input type="checkbox"/> Reduction in Force	<input type="checkbox"/> Transfer	
<input type="checkbox"/> Demotion	<input type="checkbox"/> Resignation	<input type="checkbox"/> Status Change	
Remarks			
APPROVALS			
X		X	
Human Resources		Chief Financial Officer	
X			
Sheriff / Chief of Staff			
Received by Payroll Unit	Date	Entered in Employee File	Entered Computer

CLAY COUNTY SHERIFF'S OFFICE
Clay County, Florida
VENDOR QUOTATION WORK SHEET AND PURCHASE REQUISITION

COMPANY INFORMATION				SUMMARY OF QUOTATIONS				
VENDOR 1	Company Name			Item	Quantity	Vendor 1	Vendor 2	Vendor 3
	Company Address							
	Contact Name		Telephone Number					
	Quote Received :		Quote Good Through:					
VENDOR 2	Company Name							
	Company Address							
	Contact Name		Telephone Number					
	Quote Received :		Quote Good Through:					
VENDOR 3	Company Name							
	Company Address							
	Contact Name		Telephone Number					
	Quote Received :		Quote Good Through:					
				Shipping & Delivery				
				TOTAL		0.00	0.00	0.00
				TERMS				

Was the purchase made on an Emergency Basis? YES ☐ NO ☐
 Is this purchase made from a sole source vendor? ☐ ☐
 Is this item on Florida State Contract or G.S.A. pricing? ☐ ☐
 Was the lowest bid less than Florida State Contract or G.S.A. pricing? ☐ ☐

DEPARTMENT CODE

**Select Department Code within appropriate
Bureau or the request will not be processed.**

Vendor Selected:		Requesting Employee Signature:		Date:	
Grant: Yes <input type="checkbox"/> NO <input type="checkbox"/>		If yes, indicate which grant-			
Item	Description	Quantity	Unit Price	Amount	Fund Account Number
				\$0.00	
				\$0.00	
				\$0.00	
				\$0.00	
				\$0.00	
				\$0.00	
				\$0.00	
				\$0.00	
				\$0.00	
				\$0.00	
				\$0.00	
				\$0.00	
				\$0.00	
				\$0.00	

1. Captain's Approval		Date	3. Chief Financial Officer		Date
2. Bureau Commander		Date	4. Purchasing Director		Date

CLAY COUNTY SHERIFF'S OFFICE
REQUEST FOR TRAINING / COLLEGE

Please check one: Training College

EMPLOYEE NAME: _____
Last First ID #

DATE: _____ BUREAU: _____ DIVISION: _____

SECTION: _____ UNIT: _____

NAME OF COURSE / SEMINAR: _____

ATTACH AVAILABLE LITERATURE ON REQUESTED TRAINING

OFFERED BY: _____ LOCATION: _____

DATES OF TRAINING FROM: _____ TO: _____

TIMES OF TRAINING FROM: _____ TO: _____

TOTAL NUMBER OF TRAINING HOURS FOR TRAINING COURSE _____ HOURS

TOTAL TRAVEL TIME TO ATTEND TRAINING: _____ HOURS

COST OF TRAINING / COLLEGE: \$ _____ *ESTIMATED TRAVEL COST: \$ _____

DEGREE PROGRAM: _____ COURSE NUMBER: _____

*(Attach CCSO/F-006 and F-009 for airfare, rental car, etc.)

(IF FOR COLLEGE CREDIT SEE COLLEGE FINANCIAL REIMBURSEMENT POLICY)

SALARY INCENTIVE: YES NO

(IF SEEKING SALARY INCENTIVE, APPROVED ANNUAL LEAVE MUST BE SUBMITTED IN TELESTAFF
TO BE CONFIRMED BY HR, IN ORDER FOR SALARY INCENTIVE TO BE FINALIZED.)

	APPROVED	DISAPPROVED	DATE
SERGEANT/SUPERVISOR	_____	_____	_____
LIEUTENANT/DIRECTOR	_____	_____	_____
APPROVED ON DUTY: _____	APPROVED OFF DUTY: _____		
CAPTAIN	_____	_____	_____
MAJOR	_____	_____	_____
CHIEF OF STAFF	_____	_____	_____

RETURN TRAVEL: ALL RECEIPTS FOR REGISTRATION AND HOTEL COSTS/SIGNED RECEIPTS MUST
BE TURNED IN TO ACCOUNTING UNIT. UPON COMPLETION OF TRAINING, THE EMPLOYEE WILL
FORWARD A COPY OF ANY CERTIFICATE/DIPLOMA TO THE TRAINING SECTION.

REMARKS: _____

FUND: _____ ACCOUNT: _____ DEPARTMENT: _____ GRANT ID #: _____

HR DIRECTOR _____ REIMBURSEMENT AMOUNT: \$ _____

CHIEF FINANCIAL OFFICER: _____

REGISTERED BY: _____ DATE: _____