

Automate the IT Professional/Technical approval Process as part of the EDMS Questions and Answers January 15, 2010

Regarding the IT Forms/templates; could you provide examples of these raw forms as used today to give us a feeling for the level of complexity?

A: On average there are 8 different forms for 5 dollar categories as defined by the 902TS Master Contract Program forms and documentation instructions
http://www.oet.state.mn.us/mastercontract/itpts/mcp902ts/docs/mcp902ts_customer_forms.html

Also, would there be areas of these IT forms/templates that are mandatory and other areas optional? And if so does this need to be enforced by the system – OR would the reviewers be responsible for auditing these requirements.

A: The reviewers/approvers would let the requester know if they had used the wrong form. Our new solution would advise the requestor of what to use up front in the user interface.

You talked about the off-line and on-line scanning – is this only relevant for the supporting documents/attachments? OR were you also including this as a deliverable for the forms/templates once they were completed? Are I would think the forms/templates may need to be revised so they would be in a maintainable form – not a scanned form.

A: Our forms do change periodically. The format most often used is WORD. We have a need to adhere to the new government standards of accessibility for the disabled which means that we want all these forms accessible. Scanned forms – or PDFs – are not accessible in this way.

Are there business rules that govern what supporting documents must be included as part of a given form/template process? If so would this also be included in the automation process or would the reviewers/approvers check this?

A: There are rules that apply to certain dollar engagement requests. Most of these rules apply to a different user groups – which are part of phase II - but, we may encounter this need as we do further analysis for phase I.

Requirement number 2 – does this level of comprehensive instruction exist today for the current manual process?

A: Yes

Please give me an example of requirements number 9. What would be the “details of various sections” that would need to be stored in a central DB?

A: FileNet has the ability to automatically scan various assigned sections of any electronic form and store the information in a database. This data is used for tracking and reporting purposes.

Would all Requesters and all Approvers be part of the state Active Directory/Exchange environment? And if so have groups/roles been part of that deployment?

A: Yes. This is part of our project plan.

For requirement 13, what is your definition of an acceptable electronic signature?

A: This is yet to be determined. We have looked at several methods of acquiring a signature for this approval process.

Are the current manually created forms scanned, indexed and stored electronically for archival purposes? If so what is currently being used to do this? (I know this is not part of Phase I – but it may give us an idea of the scope of effort for determining indexing needs if this is or is not already in place.)

A: No. We have a commerce application which has these capabilities today utilizing FileNet. This IT P/T Approval Process project is separate from this other application.

Please explain more details about the OET staff that will assist with the development. Is this unlimited resource availability? Are there constraints? What are their qualification and level of experience/expertise?

A: All team members are highly qualified. You can read more about the OET capabilities at our web site. See: <http://www.state.mn.us/portal/mn/jsp/home.do?agency=OETweb>

What will be the availability of the “Business Staff” and “oversight/technical assistance staff” to work on this project?

A: Staff is generally available during business hours from 9 to 5 PM but this may vary depending on schedules.

1. We assume these business requirements will require only configuration changes and that no modifications to current standard functionality of SharePoint or FileNet will be required. Can you confirm?

A: Yes, this is true for both FileNet and SharePoint

1. For BR #9 we assume this is the SharePoint repository not an additional MS Access database. Please confirm.

A: Yes, that is right. The data currently in place for this process is on an Access database. This project would use a new database.

1. How many MMD forms?

A: On average there are 8 different forms for each dollar level as defined by the 902TS Master Contract Program forms and documentation instructions
http://www.oet.state.mn.us/mastercontract/itpts/mcp902ts/docs/mcp902ts_customer_forms.html

2. We assume that once the other agencies have their documents ready to submit to the repository, they will utilize the same standard workflows, forms, and approval authorizations as developed for the OET. Is this a correct assumption?

A: Basically your assumption is correct, yet there will be a way to expedite a process given certain circumstances.

3. The site will be used internally only by Minnesota state agencies. No external users will be allowed to use the system, for example, IT products and services suppliers. Please verify that this assumption is valid.

A: This is valid assumption for Phase 1

1. We assume dates are dependent upon the award of this contract, engagement and on-boarding of qualified staff and as such are flexible. For example, with contract award scheduled for Jan 28, Design Deliverable cannot be delivered on Feb 1. Other dates will need to be validated depending upon actual start dates. Please confirm these assumptions.

A: We have a firm deadline of March 31, 2010. Any adjustment to timeline would affect other project stages – such as testing. We realize these constraints and can only strive to meet the business deadline.

2. For the deliverable, “Develop a Business interface model for Office of Enterprise Technology which is a guide...” do you have a preference for the type of deliverable(s) such as online, paper, or quick guides?

A: No preference, just a deliverable that will show progress and definition.

3. Please provide the approximate number of trainees for the Training/Knowledge Transfer.

A: Approximately 75

1. How firm is the 3 year requirement in development using these products? Will staff exceptional experience, including customer reference ability, for a shorter duration be considered?

A: Experience is a key element used in scoring responses. If a response does not reflect the required level of experience or references required it will be reflected in our scoring effort.

2. How important is "State Document Management" experience as opposed to private sector experience?

A: While document management is what we need, if any response shows a history of working with the state in the past this is a plus.

3. Will the three year experience requirement be qualified as experience related to configuring and managing workflows in SharePoint or will three years of general SharePoint experience be sufficient?

A: While record management is a key aspect there are workflow aspects that would need a certain amount of expertise.

1. SharePoint Designer is a tool that can be used with Windows SharePoint Services 3.0 and Microsoft Office SharePoint Services (commonly called MOSS) to customize SharePoint sites. Do

you have a preference to use or not use SharePoint Designer?

A: No preference. We are looking for whatever will bring the best solution by the deadline we have defined.

2. SharePoint Views are a means of allowing users to quickly view the information they find relevant. Do you want the users to be allowed to customize their own views?

A: No. The solution would involve a set user interface common to all users.

3. Please comment on the numbers of user groups that might have significantly different needs or usage patterns for this system.

A: The only potential variation would be at the agency level when it comes to expediting a document due to certain circumstances.

4. Please comment on the current state of the SWIFT system in terms of data requirements and interfaces.

A: SWIFT is strictly a procurement application – see: <http://www.swift.state.mn.us/>

1. There is a very small time window between vendor finalization, requirement elicitation and submission of design document. Is there any flexibility on these time-frames?

A: We are on a very tight timeline to deliver the needed solution – any adjustment to timeline would affect other project stages – such as testing. We realize these constraints and can only strive to meet the business deadline – launch by March 31, 2010.

2. As a responsibility expected from selected vendor, it is required to provide Subject Matter experts – are these experts on DMS or on FileNet/Sharepoint?

A: While we are looking for a proposal that will show us the level of expertise of the vendor – we do have SMEs at the Office of Enterprise Technology regarding both FileNet and SharePoint.