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# APPENDIX D - PRODUCT/SERVICE REQUIREMENTS

**WSIPC RFP 23-01 Contract Lifecycle Management Solutions**

## INSTRUCTIONS

Please answer each requirement based on the proposed solution’s ability to satisfy the respective requirement. If the requirement cannot be met and warrants further explanation, a brief explanation may be provided in the “Comments” column. The following scoring system should be used to evaluate each business requirement:

|  |  |
| --- | --- |
| **Response Code** | **Definition** |
| Y—Yes | Requirement is met. |
| N—No | Requirement is not met. |
| Q—Qualifier | Ability to meet requirement requires further explanation from Vendor. Please use the "Comment" column to provide more details. |

## General

| **Requirements/Specifications** | **Yes** | | **No** | **Q** | | **Comment *(Required if “Q” is selected)*** |
| --- | --- | --- | --- | --- | --- | --- |
| **Product/Service Usage -** The product and/or service is used by other Washington State K-12 school districts and has an active Washington State user community. |  |  | |  |  | |
| **Documentation -** Describe access to operational, instructional, and/or specification sheets. It is highly desirable that this type of information be available to customers electronically via the internet (preferred) or other electronic means of delivery. |  |  | |  |  | |
| **Shipping Costs -** All costs for shipping to the buyer’s location, must be clearly stated on price lists and promotional materials, and must be clearly described in the Proposer’s response to this RFP. |  |  | |  |  | |
| **Vendor Website -** The Proposer must have an active website with published product and/or service information. |  |  | |  |  | |

## Technical/functional Requirements

| **Requirements/Specifications** | **Yes** | | **No** | **Q** | | **Explanation *(Required if “Q” is selected)*** |
| --- | --- | --- | --- | --- | --- | --- |
| Cloud-based document management environment to facilitate the complete electronic lifecycle of contracts. |  |  | |  |  | |
| Creation, modification, secure storage, and electronic workflow/approval routing of contracts. |  |  | |  |  | |
| Detailed and executive-level customizable reporting for contract expiration, contract value, and contract type. |  |  | |  |  | |
| Automation of reporting, audit trails, and workflow management processes. |  |  | |  |  | |
| Ability to upload/update contract templates in any type of common file forms. |  |  | |  |  | |
| Centralized template library: ability to build custom templates and store templates. |  |  | |  |  | |
| Solution for document storage, back-up, and security. |  |  | |  |  | |
| Support electronic signatures in parallel or sequence. |  |  | |  |  | |
| Allow for role-based security and task assignments. |  |  | |  |  | |
| Audit trail of all transactions. |  |  | |  |  | |
| Audit and security to comply with internal and external audit requests. |  |  | |  |  | |
| Single sign-on user account authentication (SAML or LDAP enabled). |  |  | |  |  | |
| Automated workflow for routing approvals with email alerts |  |  | |  |  | |
| Ability to search full-text and keyword searches within contracts, attachments, clauses, etc. Search by a wide range of variables (customer, deliverables, milestone dates, etc.). |  |  | |  |  | |
| Ability to group and filter search results as well as save search for future use. |  |  | |  |  | |
| Ability to manage faxed and scanned documents as well as native files in any format including all versions of .doc, .pdf, .ppt, and .xls file types, and common image formats. |  |  | |  |  | |
| Document version control and the ability to compare versions and originators. |  |  | |  |  | |
| Ability to route a contract outside of the District/School/Enterprise/Agency for the purpose of review, editing, negotiation, and finalizing the document. |  |  | |  |  | |
| Ability to store and establish links to a contract or other related documents. |  |  | |  |  | |
| Ability to generate email notifications and reminders regarding contract status. |  |  | |  |  | |
| Customer support model during business hours and off-business hours. |  |  | |  |  | |
| Robust reporting capability including ability to create and save custom reports, in various formats and allow for ad-hoc reporting. |  |  | |  |  | |
| Seamless integration with existing systems (i.e., Microsoft Office tools, DocuSign, SharePoint and Skyward or Education Management Systems). |  |  | |  |  | |
| Electronic Signature feature or integration with e-Signature software. |  |  | |  |  | |
| Ability to upload/import existing contracts and add new contracts (i.e., uploading, emailing, integration with e-Signature). |  |  | |  |  | |