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Project: DMS RFP

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REQUEST FOR PROPOSALS FOR A DOCUMENT MANAGEMENT SYSTEM

Introduction

The City of Cotati (City) invites proposals from firms interested in providing a Document Management system.

Background

The City of Cotati (“City”) in Sonoma County, California, is preparing to acquire a Document Management System (“DMS”) to manage its electronic information, identify business records, and apply retention rules to business records for compliance. The project is being coordinated through the Office of the City Manager.

The City has identified the business and functional requirements to select and configure a DMS. Use of the DMS will include capabilities to:

- Manage electronic work-in-process, including options to automate routing, review and approval of recurring activities (workflow);
- Determine which information has met the threshold of a business record;
- Apply retention requirements to business records, ensure they remain secure and can be disposed of securely;
- For information that will be retained, efficiently ingest existing documents into the DMS from network shared drives, local drives, and via scanning hard copy documents;
- Identify key information about electronic documents (e.g., metadata) to easily save, index and retain documents in the DMS;
- Enable flexible, user-friendly searches of document names, metadata, and content.

Approach

The City’s subject matter experts from five City Departments have identified the specific business and functional requirements for each department, including:

- City Manager, including City Clerk
- Administrative Services
- Community and Economic Development

Attachment B
Draft Agreement

