



THE UNIVERSITY OF  
SOUTHERN MISSISSIPPI  
1848 • 2025

# THE UNIVERSITY OF SOUTHERN MISSISSIPPI

January 21<sup>st</sup>, 2022

## ADDENDUM 1 TO RFP 22-26

This addendum provides answers to questions submitted by prospective bidders and extends the date of the bid opening. The revised opening date is February 17, 2022, at 2:00 p.m.

Steve Ballew, Director of Procurement and Contract Services

Questions		Answers
1	Is there any expected timeframe within which you would like this system to go-live?	Fall 2023
2	Do you have a data migration work, if yes then how much data do you have currently?	Yes. 2 Terabytes
3	Can you please provide us a pricing format to enable us to give you pricing as per your requirement? or shall we prepare it ourselves?	Paige - The vendor should prepare an annual pricing format.
4	For accessing Document Management System, how many users will need full rights (upload, edit documents) and how many will need read-only rights (only view the documents or participate in workflow process)?	We have 380 current active users. I don't know how many are read only, but the solution should be able to handle this number actively editing documents as well as reading others.
5	Will any other external vendor or consultant of university need a Read-Only access to Document Management System through a Public Portal?	No.
6	Is University's preference more towards Cloud based Document Management System or On-Premises Document Management System?	We prefer the one that will work the best for our university. We will consider both.
7	Do you have budge already available for this project? If yes, what is the maximum budget you are planning to spend on this project?	We do have a budget, but that information is not available.

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8	<p>Do we need to provide Scanning services as a part of this project? If yes, please provide answers to following scanning related questions:</p> <p>a. What is the size and quantity of the files that needs to be scanned? Please provide approximate quantity next to the below given sizes:</p> <ol style="list-style-type: none"> <li>1. 8.5"x11" up to 11"x17":</li> <li>2. 11"x17" up to 18"x24":</li> <li>3. 18"x24" up to 24"x36":</li> <li>4. 24"x36" up to 36"x48":</li> </ol> <p>b. What is the required preparation level before scanning the files? (how many staples or fasteners are there on each file approximately)?</p> <p>c. What DPI are you looking to scan the files at?</p> <p>d. Do you want to make the files text searchable (OCR)?</p> <p>e. What is the indexing requirements? Per Page, Per document, etc.?</p>	<p>Yes. We need scanning services. However, our offices have already purchased scanners, like the Fujitsu fi-7180 or the Canon imageformula DR-C230. We would need the vendors' solutions to work with and the software to support these existing scanners.</p> <p>a. Many of our scanners only handle 8.5"x11" with at least 60 pages per minute. Offices accepting legal size documents have a scanner that can scan in that size. Offices receiving larger documents, like 11"x17", will use a copier to scale the document down for ingestion into the document management software. Another process used to scan the document on the copier and use the Perceptive Content digital printer to "print in" the document into Perceptive Content. This is not a regular occurrence.</p> <p>b. The person scanning removes staples and fasteners.</p> <p>c. 200 - 600 dpi capability.</p> <p>d. Yes, if possible.</p> <p>e. We currently use per document indexing.</p>
9	<p>Have University seen demonstrations of any Document Management System? If yes, what is the name of the solution and vendor which provided the demonstration?</p>	<p>Yes, Hyland OnBase</p>
10	<p>Did any vendor helped you prepare or gather requirements of this RFP? If yes, what is the name of that vendor? And is this vendor eligible to bid on this RFP?</p>	<p>No</p>
11	<p>1) Due to the scale and scope of the your current and proposed Document Management solution, the thoroughness of the response we'd like to submit and the requirement for physical mailing of the proposal we would like to respectfully request a 2 week extension to February 10, 2022 please.</p>	<p>We will extend the proposal due date to February 17, 2022, at 2:00 p.m.</p>
12	<p>2) Can USM elaborate on the total number of users that would use the Document Management solution with a break-down of full time and casual or other user types please?</p>	<p>We currently have 380 total users. On average, 100 users are simultaneously connected. We expect this number to continue to grow.</p>

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13	Please provide the University regulations and policies regarding Personally Identifiable Information (PII) data protection referenced in Sect. 12 on RFP p.3.	<a href="https://usm.policystat.com/policy/token_access/e244053e-c4df-4f28-a796-c38b7b4bfdcd/">https://usm.policystat.com/policy/token_access/e244053e-c4df-4f28-a796-c38b7b4bfdcd/</a>
14	Please provide the “Mississippi Department of Information Technology Services, Security Services Division, State of Mississippi Enterprise Cloud Offsite Internet Hosting Security Policy” referenced in Sect. I (“Cloud Hosted Services”) on RFP p. 11.	<b>DO NOT PUBLISH THIS DOCUMENT</b>  There is no public link for this. We are providing a copy along with the answers to these questions, but it cannot be left published anywhere.
15	The “USM Terms and Conditions” embedded at RFP p.3, Sect. 10, includes provisions that apply if the procurement is issued under a government contract or government grants. Are these applicable?	No
16	Will USM sign an NDA?	A Non-Disclosure Agreement would be reviewed by University General Counsel before signing.
17	Additionally, are you able to provide the number of users you currently have for your Hyland Perceptive Content solution? How many of the users are administrators of the system?	380 total, with 3 current administrators. There have been as many as 5 administrators in the past.
	Would it be possible to get a two-week extension through Feb. 10 <sup>th</sup> ?	We will extend the proposal due date to February 17, 2022 at 2:00 p.m.
18	How long has USM utilized Perceptive Content Document Management Solution?	Paige - 10 years
19	When was the last major upgrade or expansion of Perceptive Content deployment?	November 2018
20	How many concurrent users have accessed the current solution in the past year?	380 total, with 3 current administrators.
21	What Departments are heavy users of the current Document Management Functionality?	<ul style="list-style-type: none"> <li>• Accounts Payable</li> <li>• Athletic Compliance, Business Services,</li> </ul>

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		<ul style="list-style-type: none"> <li>• Center for Military Veterans, Service Members, and Families</li> <li>• Children’s Center for Communication and Development</li> <li>• College of Arts and Sciences</li> <li>• College of Business and Economic Development</li> <li>• College of Education and Human Sciences</li> <li>• College of Nursing and Health Professions</li> <li>• Dubard School for Language Disorders</li> <li>• Financial Aid</li> <li>• Graduate Admissions</li> <li>• Honors College</li> <li>• Housing and Residence Life</li> <li>• International Admissions</li> <li>• iTech</li> <li>• Marine Science</li> <li>• Office of Internal Audit</li> <li>• Office of Research Administration</li> <li>• Office of the Controller</li> <li>• Procurement</li> <li>• Registrar</li> <li>• Undergraduate Admissions</li> <li>• Undergraduate Scholarships</li> <li>• University Advisement Center</li> </ul>
22	Is USM planning any new expansion of Document Management or eForms Functionality into Departments that have not used a digital solution previously?	We have recently implemented FormStack form software. We are seeking an e-Signature solution and a contract management solution that would be used by all departments.
23	Is the Document Management solution integrated with and key systems of record on campus, SIS, ERP, HRM, CRM?	<p>Our document management solution must integrate Single Sign On using SAML 2.0 IDP.</p> <p>Import and Export integration with Anthology Radius. Anthology Radius will sunset Fall 2022 to be replaced by Technolutions Slate in Fall 2022.</p> <p>Oracle PeopleSoft – To index a</p>

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		<p>document, an end user will link the document with a web browser page showing PeopleSoft information. Technically, it is web scraping. It captures the web page source and places it into the document management user interface.</p> <p>OCR – Claris Filemaker Pro and RMS Mercury: document management software uses OCR to pull index information.</p> <p>Claris Filemaker Pro is used by College of Arts and Sciences Dean’s Office and School of Humanities, Provost Office, University Communications, Dubard School for Language Disorders</p> <p>RMS Mercury is used by Housing and Residence Life.</p>
24	Does USM automate any of the ingest, capture, indexing or retrieve document functions via the current Perceptive Content solution?	Yes. We automate ingesting, capturing, indexing for the Anthology Radius documents. The documents are exported from Radius and imported into Perceptive Content. We are moving from Anthology Radius to Technolutions Slate software in Fall 2022.
25	Does USM utilize workflow routing functionality to review and approve and/or annotate documents in the existing Document Management solution?	Yes.
26	Is the current system hosted on-premises or in the cloud?	On-premise.
27	Does USM utilize Peoplesoft as the ERP and SIS platform across all campuses?	Yes.
28	Has USM moved any key systems to cloud hosting in the past 3 years?	Yes.
29	Does USM utilize a software vendor for e-signatures? If so, what types of documents are managed via this application?	We do not currently utilize an enterprise solution for e-signatures but have 15 Adobe and 1 DocuSign personal

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	Does USM desire for non-credentialed users (prospective student, prospective employees, Vendors, High Schools Counselors, or Parents of Students) to be able to e-Sign documents?	accounts being used by individual departments. This solution would be for all of the university.  We would like the product to be able to be used by non-credentialed users (prospective student, prospective employees, Vendors, High School counselors, Parents of students as well as credentialed faculty, staff, and students.
30	How does USM currently service Contract Management? Is the desired functionality for contract editing and versioning, or for contract drafting, delivery, signatures and approvals?	We do not currently utilize a software vendor for contract management. We are looking for a contract management solution that will handle contract creation, versioning, delivery, signature and approvals (workflow). We can import a vendor contract that will become a new contract.
31	Does USM currently utilize software for eForms to facilitate digital submissions of records documents?	Yes. We can print from FormStack. The end user can “print” the form into Perceptive Content.
32	Does USM desire licensing to be done via a concurrent user model, or will an unlimited use model better serve needs to scale during the entire contract term?	We would like to see the cost of licensing compared using both models.
33	How many individuals are on the evaluation Committee?	Approximately 15
34	Will the bid be listed in the MS Public Procurement site at <a href="https://www.ms.gov/dfa/contract_bid_search/Bid?autoloadGrid=False">https://www.ms.gov/dfa/contract_bid_search/Bid?autoloadGrid=False</a>	Yes, it is there.
35	What departments or areas of functional expertise are represented on the Committee?	Admissions, Honors College, Office of Undergraduate Scholarships, Registrar, Dubard School for Language Disorders, Procurement, Children’s Center for Communication and Development, Financial Aid, Center for Veterans and Families, iTech
36	Will the scoring of vendors ability to meet technical	There is a score for cost that is weighted

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	requirements and scoring proposal cost be calculated independent of one another?	differently than the score for technical requirements. All scores are added to give a total score that is compared to other vendors' total scores.
37	How will formal award or notification of Non-award be made?	University Procurement will contact vendors to inform them of award or non-award.
38	Is there a preferred proposal response outline?	Please use Appendix C to respond to each requirement criteria individually. There are questions in the bid document that must be answered as well.
39	Do you have a desired go-live date?	Fall 2023.
40	How many unique users will need to access the contract management solution? How many of them will be Administrators? a. What departments are these users a part of inside of USM?	380 total, with 3 current administrators. <ul style="list-style-type: none"><li>• Accounts Payable</li><li>• Athletic Compliance, Business Services,</li><li>• Center for Military Veterans, Service Members, and Families</li><li>• Children's Center for Communication and Development</li><li>• College of Arts and Sciences</li><li>• College of Business and Economic Development</li><li>• College of Education and Human Sciences</li><li>• College of Nursing and Health Professions</li><li>• Dubard School for Language Disorders</li><li>• Financial Aid</li><li>• Graduate Admissions</li><li>• Honors College</li><li>• Housing and Residence Life</li><li>• International Admissions</li><li>• iTech</li><li>• Marine Science</li></ul>

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		<ul style="list-style-type: none"> <li>• Office of Internal Audit</li> <li>• Office of Research Administration</li> <li>• Office of the Controller</li> <li>• Procurement</li> <li>• Registrar</li> <li>• Undergraduate Admissions</li> <li>• Undergraduate Scholarships</li> <li>• University Advisement Center</li> </ul>
41	<p>Are there any applications that USM wants the solution to integrate with, either for this rollout or in the future, that we should consider? Could you provide a list of software application names?</p>	<p>Our document management solution must integrate Single Sign On using SAML 2.0 IDP.</p> <p>Import and Export integration with Anthology Radius. Anthology Radius will sunset Fall 2022 to be replaced by Technolutions Slate in Fall 2022.</p> <p>Oracle PeopleSoft – To index a document, an end user will link the document with a web browser page showing PeopleSoft information. Technically, it is web scraping. It captures the web page source and places it into the document management user interface.</p> <p>OCR – Claris Filemaker Pro and RMS Mercury: document management software uses OCR to pull index information.</p> <p>Claris Filemaker Pro is used by College of Arts and Sciences Dean’s Office and School of Humanities, Provost Office, University Communications, Dubard School for Language Disorders</p> <p>RMS Mercury is used by Housing and Residence Life.</p>
42	<p>Are there any legacy electronic document management systems that you want to convert or transfer records to a new document/contract management solution?</p>	<p>We currently use Hyland Perceptive Content document management system. If we change to a new solution, data must be converted to a new system.</p>

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43	How many contracts do you do on an annual basis?	450 formal contracts annually
44	How many historical agreements do you have today?	We do not have a specific number available but would have to include all active as well as history back at least 7 years.
45	What systems do you live in? (e.g. Peoplesoft, etc.)	Software applications were listed related to our current document management solution. We have many more applications/systems used at the university.
46	What's the approval and review process for agreements today?	Manual through emails.
47	Will you be using eSignature outside of the contract management functionality (e.g. using eSignature as a standalone solution)?	Yes. A number of departments would be interested in this functionality for other forms and approval workflow.
48	For the Independent Contractor form, we will be clicking no to all 4 checkboxes in Section 2. According to the form, if we answer no to all of them, we "proceed to question in Section 3, Exemptions from Completing". However, in Section 3 there is not an "Exemptions from Completing" section. Is there a different Section 3 it could be referring to?	<p>If the answer is "No" to all questions, proceed to questions in Section 3.</p> <p>Link to latest form is <a href="https://www.usm.edu/controller/_files/_tax/independent_contractor_determination_form.doc">https://www.usm.edu/controller/_files/_tax/independent_contractor_determination_form.doc</a></p>
49	What departments will be utilizing the Document Management System?	<ul style="list-style-type: none"><li>• Accounts Payable</li><li>• Athletic Compliance, Business Services,</li><li>• Center for Military Veterans, Service Members, and Families</li><li>• Children's Center for Communication and Development</li><li>• College of Arts and Sciences</li><li>• College of Business and Economic Development</li></ul>

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50	How many licenses need to be included in the bid?	380 total end users, with 3 current administrators.
51	Is workflow required in the Document Management System?	Yes.
52	Are there any integration requirements?	<p>Our document management solution must integrate Single Sign On using SAML 2.0 IDP.</p> <p>Import and Export integration with Anthology Radius. Anthology Radius will sunset Fall 2022 to be replaced by Technolutions Slate in Fall 2022.</p> <p>Oracle PeopleSoft – To index a document, an end user will link the document with a web browser page showing PeopleSoft information. Technically, it is web scraping. It captures the web page source and places it into the document management user</p>

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		<p>interface.</p> <p>OCR – Claris Filemaker Pro and RMS Mercury: document management software uses OCR to pull index information.</p> <p>Claris Filemaker Pro is used by College of Arts and Sciences Dean’s Office and School of Humanities, Provost Office, University Communications, Dubard School for Language Disorders</p> <p>RMS Mercury is used by Housing and Residence Life.</p>
53	Is there a backfile conversion?	We currently use Hyland Perceptive Content document management system. If we change to a new solution, data must be converted to a new system.
54	For the software solution, should we provide SQL version, Full version or Express?	Full version.

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