

**CONTRACT MANAGEMENT SOFTWARE  
RFP#16-07-05  
QUESTIONS AND ANSWERS**

- 1) Does Roanoke have a preference for an on-premise or cloud based solution?  
**A. The City does not have a preference. We would like to know all options available and pricing for those options.**
  
- 2) How many users does the city require?  
**A. This depends on what is considered a "user." The City would like for the site to be viewable by every employee and possibly the public. Less than 20 people will be creating documents and manipulating the system.**
  
- 3) What are the roles of the various users?  
**A. Roles may include Buyers, Attorneys, Risk Management staff, Legal Secretaries, Accountants, and others.**
  
- 4) The RFP mentions workflows, do you have these processes documented? If so, can you share or identify types of workflows you have or desire?  
**A. Workflow may include routing the draft contract to attorneys for review and comment, to finance for approval, to outside parties, to City staff for signature, and more. The City would like to see workflows offered through the Offeror's proposed solution.**
  
- 5) Please list the number of the users who will use the Contract Management application.
  - Contract managers or purchasing staff members or other members of the contract management team who can create, view and edit contracts:
  - Contract approvers: (people who can approve other people's contracts, not included in the above count):
  - Of these contract approvers, how many would need to access the system regularly, and how many would need access only occasionally?
  - For those that only need occasional access, how many might need to be in the system concurrently?
  - Contract submitters/requesters who can create contract records and edit their own only, can view contracts they have permission to view):
  - If you will have this type of user, will a simplified end user portal for submitting contract requests and updating their own requests be sufficient for them?
  - Note that the simplified end user portal does not include the graphical dashboards and reporting functionality of the staff level interface.

- This portal does provide for a read-only contract repository (select contracts and fields based on a user's permissions) for contracts other than those they request, if this is desired functionality.
- Vendors or external users who will have access to the system to view or submit requests:
- Other users (describe their role and usage):

**A. See above.**

6) Importing legacy data can have a significant impact on the cost of an implementation

- Do you have existing legacy contract data and/or files (e.g., scanned images of legacy contracts) to import into your contract management solution?
- If so, please describe which systems or format they are in today and the approximate number of records to migrate.
- Will attached files, contract and related files be migrated, or will they be added manually to contract records once the records are in the system? Not sure - would like options

**A. The City currently uses Laserfische.**

7) What are the required levels of training?

- Admin level training
- Will your admin level users complete our free online admin level training, self-paced?
- Or do you prefer that Offeror provides this in online sessions for your admin users?
- Staff level training
- Will Offeror be training all of your staff level users, or "training the trainers"?
- How many will be trained?
- End user level training
- Will Offeror be training your end users (contract requestors), if you have end users?

**A. This information is unknown at this time. The City would like to review options.**

8) Integration with other systems is stated as a requirement. What systems are required?

- Please describe an anticipated use case, or the cases, that would use the integration to share information between applications.
- What should the user should see regarding the integration (if anything), the step(s) in the contract management process when data is shared, and how that data sharing is initiated?

**A. Please identify the systems that the proposed solution integrates with.**

9) Do you have existing data that you need to migrate to the new system? How many contracts would you be migrating? From what other system(s)? Do you have paper contracts that need to be digitized and stored in the new system? How many?

**A. Please provide available options.**

10. How many different contract types do you currently use (typically we would break this down into general categories of contracts like Employee Agreements, Lease Agreements, Construction Agreements, Consulting Services, IT, etc...). How many templates within each contract type?

**A. Please provide available options.**