

Request for Information No.: 16016

Issued: February 1, 2016

Submission Close Date: February 22, 2016

Background

Since its founding in 1802, Saint Mary's University (herein University) has developed into a modern, urban school with more than 7,000 full and part-time students. The students attend day and evening classes both on the 30-acre campus in the south end of Halifax and at several off-campus locations.

The University implemented the Ellucian Banner ERP (Electronic Resource Planning) solution in 2005 and the following Banner applications are in place;

- Student (including Accounts Receivable)
- Finance
- Human Resources (including Position Control)
- Advancement

Purpose

The purpose in issuing this RFI (Request for Information) is to gather material on the options available to the University for the acquisition and implementation of a document imaging and workflow/electronic approval software solution. In its commitment for the continuous delivery of quality service to students, faculty, staff and external stakeholders, the University is investigating a solution that will augment and streamline core business and service delivery processes.

Phase One of this project will include the following service delivery units;

- Enrolment Services
- Financial Services
- Human Resources/Payroll

This is an information gathering exercise only; there will be no contract award as a result of issuing this document. The intent at this juncture is to obtain basic knowledge on the functionality offered in the marketplace as well as to gain an understanding of the functionality / fee structures available. The University makes no commitment to proceed further following this RFI. In the event that options appear viable and approval is received, the University would then initiate a public Request for Proposal (RFP) process in the spring of 2016. This RFI will not serve as a pre-qualification; participants will be free to respond to an RFP if it occurs, whether or not they respond to this RFI.

Solution and Response Requirements

- Ability to image, store and retrieve documents from multiple locations
- Software accessible/operational via desktop, web and mobile devices
- Electronic approvals and attachments with proxies, alerts, workflow status, triggers and process failure alerts
- Integration with Banner and other key university software applications/systems
- Data and end user security
- Audit trails
- Redaction functionality

- OCR (Optical Character Recognition)
- Conversion of existing electronic documents (official University student files are currently stored electronically with seven years of historical information available)
- Total cost of ownership including but not limited to;
 - Hardware requirements
 - Software fees
 - Licensing options
 - Implementation/training costs
 - Maintenance requirements including upgrades
- Data storage options (Cloud based, In-House etc)
- End user support
- Defined implementation timeline and university resource requirements
- Inter-unit process improvement capacity of systems
- Information related to savings realized in other universities through the implementation of document imaging and electronic workflow application

RFI Responses

The University will accept responses until 3:00 p.m. Atlantic Time, as designated by the Procure to Pay Services office clock on the date specified on the covering page, to:

Saint Mary's University
Procure to Pay Services
Wendy Zegray – RFI 16016
McNally Main MM026
923 Robie Street
Halifax, NS B3H 3C3

RFI Submissions shall consist of the following:

- 5 hard copies of the respondents written response
- 1 soft copy (USB Flash Drive)

Responses should be sealed and shall be received in writing. Electronic submissions and amendments thereto, (e.g., phone, fax, email) will not be considered.

The RFI number and title should appear on all submissions, including the outer packaging. Late submissions will not be considered.

Responses can include a short (maximum 5 pages) overview of the participant's organization and include an outline of the unique features / functionality of the solution. Information can also include detail on the Canadian schools currently using the proposed management software solution.

Respondents are asked to identify a primary contact person in the event that questions arise. Any expenses incurred in the preparation of a response are the responsibility of the respondent.

Inquiries may be directed to the above noted contact.