

Vendor / System: \_\_\_\_\_  
 Representative \_\_\_\_\_  
 Date: \_\_\_\_\_

If answer exceeds block, continue on separate document using corresponding ID number.

<u>ID</u>	<u>Section</u>	<u>Desired Functionality</u>	<u>Answer (continue answer on separate document)</u>
D1	Doc Imaging/Capture	Does your system provide the ability to handle documents of mixed media types, sizes and conditions?	
D2	Doc Imaging/Capture	Does your system provide support for leading scanners and input devices?	
D3	Doc Imaging/Capture	Does you system provide image enhancement features?	
D4	Doc Imaging/Capture	Does you system provide the ability to capture color documents?	
D5	Doc Imaging/Capture	Does your system provide the ability to integrate with leading capture systems?	
I1	Indexing	Does your system support fielded indexing?	
I2	Indexing	Does your system support full-text indexing?	

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I3	Indexing	Does your system support bar coding, both generation of the barcode and creation of the barcode?	
I4	Indexing	Does your system provide automated data capture, i.e. zoned optical character recognition/intelligent character recognition support for index extraction, barcode recognition, etc., as well as manual indexing and data entry?	
I5	Indexing	Does your system provide the ability to provide a full audit trail for all changes to indexing information?	
I6	Indexing	Does your system provide the ability to modify existing indexes?	
DM1	Doc Management	Does your system provide a single logical repository for documents (accessed by multiple users in multiple on-site or remote locations)?	
DM2	Doc Management	Does your system provide the ability to store all object types, including document images, document and desktop files, PDF, JPEG, TXT RFT, photos, videos, audio, email?	
DM3	Doc Management	Does your system support check in/check out?	
DM4	Doc Management	Does your system offer version control?	
DM5	Doc Management	Does your system provide for annotations and redactions with security?	

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DM6	Doc Management	Does your system offer major and minor versions?	
DM7	Doc Management	Does your system provide the ability to support published versions (finalized available for public viewing) versus non-published versions (editable, only available to the users with rights)?	
DM8	Doc Management	Does your system provide a missing documents checklist?	
RM1	Record Management	Does your system provide support for reliable retention of documents in accordance with relevant regulations/best practices?	
RM2	Record Management	Does your system provide the ability to ensure timely disposition (disposal) of documents in accordance with relevant best practices (keeping an audit of all record destructions, providing certifiable proof of destruction)?	
RM3	Record Management	Does your system provide the ability to notify administrators or managers when disposition or migration is called for?	
RM4	Record Management	Does your system provide the ability to define retention and disposition schedules (which are monitored to ensure compliance)?	
RM5	Record Management	Does your system provide the ability for users (with rights) to declare documents or content as records, add them to the records repository, and assign a status to prevent destruction?	
RM6	Record Management	Does your system provide security over electronic records to ensure trustworthiness so it can be upheld in court, i.e. appropriate backups, security, version control, retrieval capabilities, access control?	

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CS1	Content Security	Does your system provide the ability to set security at the user and group levels?	
CS2	Content Security	Does your system provide the ability to limit what users can see and do based on security level?	
CS3	Content Security	Does your system provide the ability to provide access to previous document versions, based on security?	
CS4	Content Security	Does your system provide the ability to maintain audit log for user changes (i.e. index or document changes)?	
CS5	Content Security	Does your system provide support for single-sign-on environments?	
CS6	Content Security	Does your system provide support for security access control down to the document and annotation levels?	
S1	Search	Does your system support search and retrieval from browser-based interfaces?	
S2	Search	Does your system support search and retrieval from thick and thin-client interfaces?	
S3	Search	Does your system provide the ability to support multi-attribute search?	

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S4	Search	Does your system provide the ability to save searches and to share saved searches with other individuals, groups and departments?	
S5	Search	If your system has notes capability, are they searchable as well?	
INT1	Integration	Does your system provide integration with Microsoft Office Suite?	
INT2	Integration	Does your system integrate with our Yardi 7S software at both the data and user interface levels?	
INT3	Integration	Does your system provide documented, standards-based application programming interfaces (APIs)?	
INT4	Integration	Does your system integrate with Yardi 7S's letter and form generation module for automated filing and indexing?	
BF1	Browsing/Folders	Do you allow the same document to be a member of multiple folders?	
BF2	Browsing/Folders	Can you replicate our existing physical file folder structure with sections depending on program type? (i.e. HCV, PH, FSS, Tax Credit, etc.)	
BF3	Browsing/Folders	If a document resides in multiple folders, is the document replicated or is it cross-referenced?	

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BF4	Browsing/Folders	Can folders and sub-folders be auto created when new documents are added?	
BF5	Browsing/Folders	Can we search folders for a list of missing documents?	
BF6	Browsing/Folders	Can notes be added to folders?	
BF7	Browsing/Folders	Can folders be moved, copied and re-ordered?	
WF1	Workflow	your system provide the ability to support advanced routing logic within work processes?	
WF2	Workflow	Does your system support configurable workflows by program type (i.e. recertification process for PH vs. HCV)?	
WF3	Workflow	Does your system provide the ability to route images, documents or work items based on any available index criteria?	
WF4	Workflow	Does your system provide the ability to support both serial and parallel routing?	
WF5	Workflow	Does your system provide the ability to generate a notification for high priority, escalations, pending and overdue work items?	

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WF6	Workflow	Does your solution provide the ability for users to draw from a shared queue of work tasks?	
WF7	Workflow	Does your solution provide the ability to integrate with other systems for notification of pending work tasks, i.e. email, etc.?	
WF8	Workflow	Does your system provide the ability for users to digitally sign a work item or document?	
WF9	Workflow	Does your solution provide the ability for users to specify delegates to complete their work tasks when they are unavailable?	
WF10	Workflow	Does your system provide visibility into different users' tasks and workloads by managers for work balancing and metrics?	
WF11	Workflow	Will your staff provide workflow and process improvement consultation as part of the contract?	
LSM1	License/Support/Maint	Is your solution offered as a service on a subscription basis as well as a perpetual license?	
LSM2	License/Support/Maint	Will your organization provide software maintenance?	
LSM3	License/Support/Maint	What is included in the standard maintenance contract?	

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LSM4	License/Support/Maint	Is maintenance provided by third parties or your personnel?	
LSM5	License/Support/Maint	How often does your organization update and upgrade the software?	
LSM6	License/Support/Maint	How long are previous releases supported?	
LSM7	License/Support/Maint	Are new releases backward/forward compatible?	
LSM8	License/Support/Maint	Do you provide customer support?	
LSM9	License/Support/Maint	What level of support do you provide?	
LSM10	License/Support/Maint	What hours is your Technical Support department available for support?	
LSM11	License/Support/Maint	How quick are the normal response times?	
LSM12	License/Support/Maint	Will you provide off-hours support?	



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LSM13	License/Support/Maint	What if we need to contact you after regular business hours?	
LSM14	License/Support/Maint	How do you solve problem isolation and identification procedures?	
LSM15	License/Support/Maint	What are your problem escalation procedures?	
LSM16	License/Support/Maint	How do you release new software versions and updates?	
LSM17	License/Support/Maint	How are these new releases installed?	
LSM18	License/Support/Maint	How often is the typical release cycle?	
LSM19	License/Support/Maint	Is any third-party software included in the system that is being proposed?	
LSM20	License/Support/Maint	Does your system provide on-line help?	
LSM21	License/Support/Maint	Does it provide it at the field entry level?	

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LSM22	License/Support/Maint	Does your system provide a way for users to create an on-line help?	
LSM23	License/Support/Maint	What documentation is provided with your system: user, administration, operational?	
LSM24	License/Support/Maint	What format is the documentation in?	
LSM25	License/Support/Maint	Does your system have a backup/restore utility?	
TR1	Training	Is training provided as part of the system?	
TR2	Training	Where is the training conducted?	
TR3	Training	What administrative training is required?	
TR4	Training	What user training is required?	
TR5	Training	What training courses are recommended before implementation?	

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HWR1	Hardware Req	Where will the primary software (i.e. main database) be installed (server, web-based server, individual PCs)? Web-based application Preferred, Hosted environment preferred	
HWR2	Hardware Req	What are the specifications for the server, if applicable?	
HWR3	Hardware Req	What are the hardware (server, storage, scanner, other) requirements?	
HWR4	Hardware Req	What are the Third Party software requirements, (Server OS, Database, capturing software), for the initial projects?	