

ATTACHMENT A SCOPE OF WORK

1.0 PURPOSE

The Superior Court of California, Orange County (Orange Court) is seeking proposals from qualified parties to improve its compliance with the Judicial Branch Contract Law,¹ (JBCL), services to ordering departments, and responsiveness to the Vendor community.

The **primary service being requested is an online bidding system** to replace the existing online bidding system. The current system is utilized by the other superior courts, Judicial Branch Entities (“JBEs”), the California Department of General Services (DGS), and other state agencies. As a result of the JBCL, JBEs must comply with many of the requirements placed upon California state agencies under the Public Contract Code regarding public procurement practices and procedures. Therefore, a successful Contractor will be able to interface with the DGS website.

The Court is also interested in any ancillary **contractor management services** including but not limited to:

- Insurance certificate management,
- Certification management, (e.g. contractor certifications, business certifications,)
- Public contracting code certifications such as Iran or Darfur certifications; and,
- Department of General Services Vendor status which includes the Disabled Veteran Business Enterprise (DVBE), Small Business (CA-SB) or Micro Business (CA-MB) programs and Delinquent Tax Payer status.
- Contract Management (e.g. tracking and recording executed contracts and amendments.)

The Court procures a wide variety of products and services to support its operations through the use of an online bidding system, which streamlines and expedites the procurement process, as well as maximizes participation, increases transparency and encourages competition in the award of Court contracts.

2.0 DEFINITIONS

- 2.1. “**Judicial Branch Entity**” refers to the Supreme Court, each Court of Appeal, each superior court, the Judicial Council, and the Administrative Office of the Courts.

¹ On March 24, 2011, Senate Bill 78 was enacted creating a new [Part 2.5](#) of the Public Contract Code (PCC) designated the California Judicial Branch Contract Law (JBCL).

Online Bidding System and Ancillary Services RFP# 1310-002

2.2. **“Solicitation”** refers to one of the following types of procurement activities some of which would result in the requirement of a cost proposal some of which would not.

Solicitation Type	Description	Cost Proposal Type (Required or Not Required)
Request for Information RFI	A solicitation document / process used when the goods or services required are not precisely defined, and there may be multiple solutions available, for which the Court desires additional information. Primarily used to gather further information about services and solutions, as a preliminary step to writing a later SOW and a later RFP. Responses are not scored or evaluated for purposes of making an Award. Rather, the solutions and ideas offered are considered by the Court	Not required
Request for Bid (RFB) or Invitation to Bid (IFB)	A solicitation document / process used when the goods and/or services to be purchased are well defined, the primary decision factor is price, and an award (if any) is made without the need to communicate with bidders after bids are received. Please note: This solicitation is primarily referred to as an Invitation for Bid (IFB).	Cost proposals are required and award is typically based on the lowest responsive, responsible bidder.
Request For Proposals (RFP)	A solicitation document / process used when the goods or services required are not precisely defined. Most often used to acquire services. Responses are judged against each other using predetermined selection criteria. The Court reserves the right to negotiate after the submittal of proposals, but may also make an award without discussions or negotiations.	Cost proposals are required and award is based upon the highest points or highest scoring value and is on a “best value” basis.
Request for Qualifications (RFQ)	A solicitation document / process used to determine which contractors meet a set of Court qualifications. Most often used to acquire services. Responses are judged against predetermined selection criteria only as to qualifications. Often used when the Court desires to create a pool of qualified contractors who can later be asked to submit work plans / quotes for specific projects, as those projects are identified; for professional services such as legal services, etc.	Cost proposals most often are required but emphasis is on achieving the most qualified candidates.
Request for Quote (RFQ)	A short, quick solicitation document / process used when the goods and/or services to be purchased are exactly defined, the primary decision factor is price, and an award (if any) is made without the need to communicate with bidders after bids are received. (Request for Quotes can be thought of as small, quick bids.)	Cost proposal is always required and award is to the lowest, responsive, responsible bidder.

3.0 JOINT PROCUREMENTS AND DISCOUNT FOR INCREASED USE BY JBES

Additionally, other state agencies and JBEs (including but not limited to other superior courts and Courts of Appeal) could choose to utilize this system with their individual procurements processes under the “piggybacking” clause or Participation Agreement in the Model Contract. If additional entities choose to utilize this system, the Court would desire for increased capacity and scalability, interface capability for shared Vendor information, certification and reporting and a proposed pricing scheme that will consider volume discounting with each entity who executes a Participation Agreement. A Sample Participation Agreement is attached to this solicitation as Attachment H and incorporated herein by this reference.

ATTACHMENT A-1 SCOPE OF WORK - ONLINE BIDDING SYSTEM

1.0 PURPOSE

Orange Court is soliciting bids from experienced and qualified companies that can provide an online bid procurement system. This system must support the entire process of a formal, competitive procurement process, including but not limited to: Requests for Information (RFI), Requests for Qualifications, Requests for Quote, Invitations for Bid (IFB) and Requests for Proposals (RFP).

The awarded bidder should maintain and support all items required by the Judicial Branch Contracting Law. Contractor's proposal **MUST** identify and demonstrate in their proposal the ability to address each of the following requirements and specifications:

2.0 HISTORICAL USAGE

This information is presented for informational purposes only and does not indicate a minimum or maximum usage. From January 1, 2012 – December 31, 2012, the Court posted 120 solicitations. The Court's current system has 14 Court Users: 8 users have read/write permissions, 3 users have approval rights, and 3 users have read-only rights. However, the Court desires a system that can support up to 80 users: 10 users with read/write permissions, 3 users with approval rights, and the remaining users to have read-only rights. At any one time, the court can have approximately 10-12 concurrent solicitations involving at least 3-4 court staff for each solicitation. The Court desires the ability to have a system that can support at least 40-50 viewing rights users in the system at the same time.

3.0 REQUIREMENTS

The successful bidder will provide a complete computerized online bidding system that most effectively addresses the requirements detailed below, including any customization required by the Court.

For purposes of this Scope of Work, the following definitions apply:

- 3.1. "Court User" refers to Court staff who use the system to post, review, and receive solicitations.
- 3.2. "Vendor User" refers to the Vendors who will use the system to respond to solicitations.
- 3.3. "Bidder" refers to the company providing the online bidding system.

<p style="text-align: center;">The System / Contractor must</p>	<p style="text-align: center;">Can Bidder Provide?</p> <p style="text-align: center;"><i>Indicate Supported, Unsupported, Third party or Custom</i></p>	<p style="text-align: center;">Bidder Explanation</p> <p style="text-align: center;"><i>In the area, provide any explanations, clarification, assumptions, and/or comments</i></p>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation.</p> <p>Supported: Contractor has the capability and/or offers the service(s).</p> <p>Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s).</p> <p>Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column)</p> <p>Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		
<p>4.0 RFP/IFB CREATION</p>		
<p>4.1. Create, publish, manage and award all solicitations types, including but not limited to: Request for Proposals (RFP), Invitations for Bid (IFB), Requests for Quotations (RFQ), Request for Qualifications (RFQ), and Cooperative Bids.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.2. Upload and store multiple boilerplate/standard documents as standard templates (as minimum documents for solicitations), which Court Users can choose to include or exclude in a solicitation. The proposed system must support a variety of document/file types including but not limited to: .docx, .doc, .xls, .xlsx, .pdf, .jpg, .tif, .rtf, csv and autocad formats. (Contractor's proposal must identify the document types that are supported.)</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.3. Upload individualized documents specific to a solicitation. The proposed system must support a variety of document/file types including but not limited to: .docx, .doc, .xls, .xlsx, .pdf, .jpg, .tiff, .rtf, csv and autocad formats. (Contractor's proposal must identify the document types that are supported.)</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.4. Customize line-items in solicitations.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.5. Advertise solicitations to potential bidders.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.6. Court can filter and notify bidders from Vendor's pre-established Vendor pool.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.7. Provide suggested Vendors for bid.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

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<p>4.8. Allow private bids, where only the Vendors chosen by the Court are allowed to see and participate in the bid.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.9. Support multiple commodity codes used to identify solicited goods and services. Minimally, the system must support; NIGP, UNSPSC, NAICS, and SIC. Contractor's proposal must identify all commodity codes that are supported on the proposed system.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.10. Automatically assign a bid number using a given format. The Court must have the ability to override a bid number.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.11. Allow the Court to upload attachments to the RFP. The attachments must be unlimited in size and number.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.12. Provide a work area for bids prior to release. These bids can be edited and deleted at any time and will not be accessible to the public.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.13. Support multiple delivery or work locations.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>5.0 RFP/IFB MANAGEMENT</p>		
<p>5.1. Provide automated, electronic tracking system of bid activity and document views by each Vendor.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>5.2. Provide online question and response management tool for each solicitation. Bidders must be able to be notified and view Court responses.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>5.2.1. Questions can have multiple answers</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

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5.2.2. Questions and responses must have a time and date stamp	Click here to enter text.	Click here to enter text.
5.2.3. The Court will be notified of incoming questions	Click here to enter text.	Click here to enter text.
5.2.4. The Court must have the ability to respond to questions as they are received	Click here to enter text.	Click here to enter text.
5.2.5. Questions relating to the bid may not be received after the Court's submittal due date	Click here to enter text.	Click here to enter text.
5.2.6. Questions should be kept anonymous.	Click here to enter text.	Click here to enter text.
5.2.7. Provide a mechanism to block or remove questions deemed to be inappropriate and irrelevant to the solicitation.	Click here to enter text.	Click here to enter text.
5.3. Provide both mandatory and non-mandatory Pre-Evaluation meetings with Vendors online. Meetings can be an audio or telephone type conference.	Click here to enter text.	Click here to enter text.
5.3.1. The Court must have the ability to mute all Vendors	Click here to enter text.	Click here to enter text.
5.3.2. Vendors must be able to type questions during the conference	Click here to enter text.	Click here to enter text.
5.3.3. Transcripts of conferences must be available to Vendors after the conference is complete.	Click here to enter text.	Click here to enter text.

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5.3.4. The system must record any agency participating in the conference	Click here to enter text.	Click here to enter text.
5.4. Ability to amend and create addenda for each solicitation	Click here to enter text.	Click here to enter text.
5.5. Distinguish between mandatory and optional bid requirements.	Click here to enter text.	Click here to enter text.
5.6. Track and display Vendor qualifications, including but not limited to local businesses, minority owned business, and Disabled Veterans. Describe the proposed system's capability to include these customizable registration fields.	Click here to enter text.	Click here to enter text.
5.7. Allow bidders to revise bids up to the bid closure date and time.	Click here to enter text.	Click here to enter text.
5.8. Allow the Court to retract a currently posted bid.	Click here to enter text.	Click here to enter text.
5.9. Allow the Court to cancel a bid once the bid has closed.	Click here to enter text.	Click here to enter text.
<p>6.0 BID SUBMISSION AND COLLECTION</p>		
6.1. Provide electronic proposal submission of sealed bids via a secure connection. Describe security features in the Bidder Explanation box.	Click here to enter text.	Click here to enter text.
6.2. Bidder can upload and attach documents as part of the bid.	Click here to enter text.	Click here to enter text.
6.3. Bidders must have the ability to take exception to forms and list exceptions. The Court's preference would be for the exceptions to be listed in summary form per submittal.	Click here to enter text.	Click here to enter text.

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<p>6.4. Bidder must digitally accept and sign terms of each document. Indicate the types of electronic signatures that are compatible with the proposed system. Digital or electronic signatures must meet the requirements of the CA State Government Code, Section 16.5 and the CA Code of Regulations, Title 2, Division 7, Chapter 10, and the CA Civil Code Section 1633.1 et seq., and any other applicable laws, rules and regulations.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>6.5. Bidders must have the ability to electronically submit notes, comments, and explanations.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>6.6. Allow bidders to indicate “will bid” or “no bid” response.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>6.6.1. The Court must have the ability to define a No-Bid Survey for Vendors to complete when they place a no-bid response.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>6.7. Provide an electronic receipt showing date and time of bid submission</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>6.8. Seal bid until after bid closing date and time and/or notice of intent to award has been issued.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>6.9. The Court may need to hide pricing information from a bid prior to the award release. Price hiding is used to enforce a pre-selection of Vendors based on non-price criteria. Provide your system’s method to support hidden prices.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>6.10. Once the bid has closed, only a Court User can decrypt the bid.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

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6.11. Provide electronic bid tabulation after bid has closed.	Click here to enter text.	Click here to enter text.
6.12. Court Users can post Notice of Award and any post-submission activity.	Click here to enter text.	Click here to enter text.
6.13. Customizable reports that can be directly accessed. Reports must be maintained for a minimum of five (5) years after the close of the RFP. Reports include but are not limited to, tabulation reports, bid packet, bid list and questions.	Click here to enter text.	Click here to enter text.
6.14. Conduct Best and Final Offers (BAFO) through the system. The Court must have the ability to contact specific Vendors who provided a submittal and as designated by the Court based on evaluation criteria (e.g. top three) without notifying all Vendors who participated.	Click here to enter text.	Click here to enter text.
6.15. Support awarding contracts to multiple Vendors. The Court may need to award to multiple Vendors, split an award, or award to a primary and secondary Vendor.	Click here to enter text.	Click here to enter text.
<p>7.0 VENDOR MANAGEMENT</p>		
7.1. Provide easy and free self-registration and self-administration for bidders. Registration information must be available to Court Users.	Click here to enter text.	Click here to enter text.
7.2. Allow multiple contacts per bidder.	Click here to enter text.	Click here to enter text.

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<p>7.3. Maintain a large and searchable database of bidders. Court Users must be able to search by, but not limited to, the following: service/commodity type, bidder name, commodity/classification code, etc. Include the number of bidders currently registered on your website. (Provide a brief description on how your business solicits the vendor community for registration.)</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>7.4. Automated, electronic notification of the release of a competitive solicitation for all Vendors in designated commodity codes. Additionally, provide automated electronic notification for any corresponding notifications, including but not limited to: addendum/changes, questions and answers, pre-award and award notifications, and notices of award.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>7.5. Track all notifications and the date and time provided to bidders.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>7.6. Method for Court to invite or designate which groups of Vendors will be notified of bid.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>7.7. Track bid activity for each Vendor (including filters for DVBE designated vendors, SBE vendors, by commodity/classification code, etc.)</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>7.8. Allow the Court to invite Vendors to the solicitations that are not currently identified in the Vendor database pool.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>7.9. Accommodate mass updates and deletes</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>8.0 VENDOR VERIFICATION</p>		

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8.1. Track and maintain Vendor submitted certifications: These include but are not limited to Darfur, Iran, DVBE, CA—SBE, CA-Micro	Click here to enter text.	Click here to enter text.
8.2. Verify Vendors are not listed on the CA Tax Delinquent lists: CA State Board of Equalization & CA Franchise Tax Board	Click here to enter text.	Click here to enter text.
9.0 COURT USERS		
9.1. Provide access only via secure and encrypted site and authenticated login and password.	Click here to enter text.	Click here to enter text.
9.2. Maintain unique username/password for each Court User. All procurement activity must be tracked back to the actual, identifiable user.	Click here to enter text.	Click here to enter text.
9.3. Support multiple access levels and permissions within the system, e.g., read-only access, read/write access, approval, etc.	Click here to enter text.	Click here to enter text.
9.4. Must be web-based and require no modification or installation of desktop components, (i.e., no client software.) Provide information regarding the technical requirements for the proposed system.	Click here to enter text.	Click here to enter text.
9.5. Indicate the maximum number of concurrent Court and Vendor users that the proposed system will allow without any impact on system performance.	Click here to enter text.	Click here to enter text.
9.6. Define workflow rules and multi-tiered approval system prior to release of a solicitation.	Click here to enter text.	Click here to enter text.
9.6.1. Workflows can contain unlimited approval levels	Click here to enter text.	Click here to enter text.

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<p>9.6.2. Approval workflows are based on business rules and characteristics of the bid, including dollar amount, general rule, user rule, department rule, classification based, supplier based and routing code based.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>9.6.3. Approvers must be notified when a bid, quote, proposal is ready for review. The Approver must have the ability to edit, approve or deny a bid.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>9.7. The Court must have the ability to maintain and assign user roles.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>10.0 REVERSE AUCTION BIDS</p>		
<p>10.1. The system must support reverse actions. Reverse auctions function like an open bid and will allow Vendors to bid any amount. If a Vendor cannot beat the lowest price bid, the Vendor can still bid and compete for second place.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>10.2. Bidders must be allowed to lower their Bids below the lowest currently-posted bid.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>10.3. All bids must be posted online and updated on a real-time basis.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>10.4. The Court must have real-time access to the bid activity.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>10.5. The identity of all bidders must remain confidential to other bidders until the awarding has been completed.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>11.0 ARCHIVE, STORAGE AND RETRIEVAL OF RECORDS</p>		

<p style="text-align: center;">The System / Contractor must</p>	<p style="text-align: center;">Can Bidder Provide?</p> <p style="text-align: center;"><i>Indicate Supported, Unsupported, Third party or Custom</i></p>	<p style="text-align: center;">Bidder Explanation</p> <p style="text-align: center;"><i>In the area, provide any explanations, clarification, assumptions, and/or comments</i></p>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation.</p> <p>Supported: Contractor has the capability and/or offers the service(s).</p> <p>Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s).</p> <p>Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column)</p> <p>Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		
<p>11.1. Securely store and protect records against, but not limited to, the following: technical hardware/software failure or errors, act of human error or failure, unauthorized access, software attacks, forces of nature, etc. Proposer must address specific encryption methods and network protocols. Also include information concerning the data center facilities used for the hosting environment.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>11.2. Court must have the ability to access all records directly.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>11.3. Maintain an audit trail of procurement transactions.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>11.4. Maintain/store all information pertaining to a bid, (e.g., documents, bids, awards,) for a minimum of five (5) years.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>12.0 TECHNICAL REQUIREMENTS</p>		
<p>12.1. Bidders must be able to access the site via any of the major commercially available web browsers, (e.g., Explorer, Safari, Firefox, Chrome, etc.) on any basic configuration Linux, PC or Mac computer. Provide detailed information about the client requirements of the proposed system and include information about supported web browsers, operating systems, and corresponding versions.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>12.2. All product updates should be available at no additional cost. Maintenance and upgrades must be scheduled and performed at a time with the least impact to the procurement processes of the Court. Court hours are 8:00 a.m. through 5:00 p.m. PST</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

The System / Contractor must	Can Bidder Provide? <i>Indicate Supported, Unsupported, Third party or Custom</i>	Bidder Explanation <i>In the area, provide any explanations, clarification, assumptions, and/or comments</i>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation.</p> <p>Supported: Contractor has the capability and/or offers the service(s).</p> <p>Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s).</p> <p>Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column)</p> <p>Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		
12.3. Perform daily system backup and provide for recovery from partial and complete disasters	Click here to enter text.	Click here to enter text.
12.4. Support generally-accepted commercial standards of accessibility features, including but not limited to, the Americans with Disabilities Act (ADA), the Rehabilitations Act of 1972, and all other applicable regulations.	Click here to enter text.	Click here to enter text.
<p>13.0 CUSTOMER SERVICE AND SUPPORT</p>		
13.1. Provide training for any new software versions or upgrades.	Click here to enter text.	Click here to enter text.
13.2. Provide comprehensive training for all user roles, (e.g., Vendors, Court Users, administrators). Provide a description of training including training materials.	Click here to enter text.	Click here to enter text.
13.3. Provide live online and telephone support for Court and Vendor users. Support must be available at a minimum Monday through Friday between 8:00 a.m. – 5:00 p.m. PST, excluding State holidays.	Click here to enter text.	Click here to enter text.
13.4. Track incoming calls/online support for Court and Vendor users.	Click here to enter text.	Click here to enter text.
13.5. Maintain information on problems or events, including but not limited to, problem description, start and end dates/times, actual or potential cause(s), corrective action taken, and future action required.	Click here to enter text.	Click here to enter text.
13.6. Provide online, context-sensitive help at the module, function/screen, and data element/field level	Click here to enter text.	Click here to enter text.

<p style="text-align: center;">The System / Contractor must</p>	<p style="text-align: center;">Can Bidder Provide?</p> <p style="text-align: center;"><i>Indicate Supported, Unsupported, Third party or Custom</i></p>	<p style="text-align: center;">Bidder Explanation</p> <p style="text-align: center;"><i>In the area, provide any explanations, clarification, assumptions, and/or comments</i></p>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation.</p> <p>Supported: Contractor has the capability and/or offers the service(s).</p> <p>Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s).</p> <p>Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column)</p> <p>Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		
<p>13.7. Provide online help that displays data element definitions for all user-accessible data elements</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>13.8. Provide online user documentation that is indexed and searchable</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>14.0 DATA CONVERSION</p>		
<p>14.1. Provide all services needed to migrate existing electronic data including, but not limited to: supplier profile, leveraged purchase agreement (LPA) and active contracts</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>14.2. Provide data import functionality to accept data from authorized external sources in the following formats: ASCII comma delimited, tab delimited, quotation delimited- CSV and XML</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>14.3. Provide data export functionality to export data in the following formats: ASCII comma delimited, tab delimited, and quotation delimited- CSV and XML</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>15.0 REPORTS</p>		
<p>15.1. Provide reports based on data field criteria. Reports may include but are not limited to award types, (single, multiple award); solicitation types, (RFQ, IFB, RFP, RFI); dollar value of award, (e.g. any over \$50,000); awards to Vendors with specific certifications, (e.g. DVBE, CA-SB; CA-Micro, etc.); no bid report; cost savings report (budget vs. proposal vs. final award)</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

<p style="text-align: center;">The System / Contractor must</p>	<p style="text-align: center;">Can Bidder Provide?</p> <p style="text-align: center;"><i>Indicate Supported, Unsupported, Third party or Custom</i></p>	<p style="text-align: center;">Bidder Explanation</p> <p style="text-align: center;"><i>In the area, provide any explanations, clarification, assumptions, and/or comments</i></p>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation.</p> <p>Supported: Contractor has the capability and/or offers the service(s).</p> <p>Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s).</p> <p>Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column)</p> <p>Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		
<p>15.2. Ability to export reports. Minimally, reports must be exported in .xls, .xlsx, .csv compatible formats. (Contractor’s proposal must identify the document types that are supported.)</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>16.0 IMPLEMENTATION</p>		
<p>16.1. Describe your implementation, including the process for migrating existing Vendor information to the system.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>16.2. Describe initial implementation training for Court Users.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

ATTACHMENT A-2 SCOPE OF WORK - INSURANCE VERIFICATION

1.0 PURPOSE

The Court is soliciting bids from experienced and qualified companies that can provide insurance certificate tracking and management. For purposes of this Scope of Work, “Vendor” refers to the companies which are required by the Court to submit insurance for verification.

2.0 REQUIREMENTS

The successful bidder will provide a complete computerized insurance certificate tracking and management system that most effectively addresses the requirements detailed below, including any customization required by the Court.

The System / Contractor must	Can Bidder Provide? <i>Indicate Supported, Unsupported, Third party or Custom</i>	Bidder explanation <i>In the area, provide any explanations, clarification, assumptions, and/or comments</i>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation. Supported: Contractor has the capability and/or offers the service(s). Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s). Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column) Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		
3.0 GENERAL REQUIREMENTS		
3.1. Manage insurance certificate collection and monitoring process.	Click here to enter text.	Click here to enter text.
3.2. Provide a web-based, real-time system, accessible 24 hours a day, 7 days a week.	Click here to enter text.	Click here to enter text.
3.3. Validate certificates monthly	Click here to enter text.	Click here to enter text.
3.4. Verify insurance meets Court’s AM BEST insurance rating requirements	Click here to enter text.	Click here to enter text.
3.5. Measure certificates and endorsements against Court requirements	Click here to enter text.	Click here to enter text.

<p style="text-align: center;">The System / Contractor must</p>	<p style="text-align: center;">Can Bidder Provide?</p> <p style="text-align: center;"><i>Indicate Supported, Unsupported, Third party or Custom</i></p>	<p style="text-align: center;">Bidder explanation</p> <p style="text-align: center;"><i>In the area, provide any explanations, clarification, assumptions, and/or comments</i></p>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation.</p> <p>Supported: Contractor has the capability and/or offers the service(s).</p> <p>Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s).</p> <p>Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column)</p> <p>Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		
<p>3.6. Electronically receive and manage electronic and/or faxed certificates</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.7. Provide search function within system to review insurance certificates</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.8. Maintain images of all documents to be easily viewed and printed</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.9. Respond to incoming calls, inquiries and/or follow up from insureds and agents.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.10. Provide access only via secure and encrypted site and authenticated login and password.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.11. Provide online access to authorized users at the Court. The system must be accessible via any of the major commercially available web browsers, e.g., Explorer, Safari, Firefox, Chrome, etc. on any basic configuration PC, Mac or Linux computer.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.12. Maintain unique username and password for each Court User. All activity must be tracked back to the actual, identifiable user.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.13. The Court must have the ability to maintain, delete and assign user roles.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.0 NOTICES</p>		
<p>4.1. Automatically send notice to Court and Contractor when a certificate has been received</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

<p style="text-align: center;">The System / Contractor must</p>	<p style="text-align: center;">Can Bidder Provide?</p> <p style="text-align: center;"><i>Indicate Supported, Unsupported, Third party or Custom</i></p>	<p style="text-align: center;">Bidder explanation</p> <p style="text-align: center;"><i>In the area, provide any explanations, clarification, assumptions, and/or comments</i></p>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation.</p> <p>Supported: Contractor has the capability and/or offers the service(s).</p> <p>Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s).</p> <p>Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column)</p> <p>Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		
<p>4.2. Automatically send notice to Court and Contractor when a certificate has been accepted or rejected and the reason for rejection.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.3. Automatically send notice to Court, Contractor and Insurance brokers regarding expiring insurance 90 days, 60 days, and 30 days prior to expiration date</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.4. Automatically send notice to Court, Contractor and Insurance brokers when insurance certificates have expired</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>5.0 REPORTS</p>		
<p>5.1. Provide reports with the following information: Contractor name, broker name, insurance company, and insurance types</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>5.2. Ability to export reports in .xls, .xlsx, .csv compatible formats. (Contractor's proposal must identify the document types that are supported.)</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>6.0 SUPPORT</p>		
<p>6.1. Providing initial training/education plan for Court Users</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>6.2. Provide training for any new software versions or upgrades</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>6.3. Provide comprehensive training. Provide a description of training including training materials.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>6.4. Tracking system for incoming issues/calls</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

<p style="text-align: center;">The System / Contractor must</p>	<p style="text-align: center;">Can Bidder Provide?</p> <p style="text-align: center;"><i>Indicate Supported, Unsupported, Third party or Custom</i></p>	<p style="text-align: center;">Bidder explanation</p> <p style="text-align: center;"><i>In the area, provide any explanations, clarification, assumptions, and/or comments</i></p>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation.</p> <p>Supported: Contractor has the capability and/or offers the service(s).</p> <p>Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s).</p> <p>Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column)</p> <p>Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		
<p>6.5. Provide live online and telephone support for Court Users and Insureds/Agents. Support must be available at a minimum Monday through Friday between 8:00 a.m. – 5:00 p.m. PST, excluding State holidays.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>6.6. Track incoming calls/online support for court and Insureds/Brokers users.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>6.7. Maintain information on problems or events, including but not limited to, problem description, start and end dates/times, actual or potential cause(s), corrective action taken, and future action required.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>7.0 TECHNICAL REQUIREMENTS</p>		
<p>7.1. Support generally-accepted commercial standards of accessibility features, including but not limited to, the Americans with Disabilities Act (ADA), the Rehabilitations Act of 1972, and all other applicable regulations.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>7.2. Must be web-based and require no modification or installation of desktop components, i.e., no client software. Provide information regarding the technical requirements for the proposed system.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>7.3. Court and Insureds/Brokers must be able to access the site via any of the major commercially available web browsers, e.g., Explorer, Safari, Firefox, Chrome, etc. on any basic configuration PC, Mac or Linux computer. Provide detailed information about the client requirements of the proposed system and include information about supported web browsers and versions.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

<p style="text-align: center;">The System / Contractor must</p>	<p style="text-align: center;">Can Bidder Provide?</p> <p style="text-align: center;"><i>Indicate Supported, Unsupported, Third party or Custom</i></p>	<p style="text-align: center;">Bidder explanation</p> <p style="text-align: center;"><i>In the area, provide any explanations, clarification, assumptions, and/or comments</i></p>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation. Supported: Contractor has the capability and/or offers the service(s). Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s). Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column) Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		
<p>7.4. All product updates should be available at no additional cost. Maintenance and upgrades must be scheduled and performed at a time with the least impact to the procurement processes of the Court. Court hours are 8:00 a.m. through 5:00 p.m. PST</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>7.5. Perform daily system backup and provide for recover from partial and complete disasters</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>8.0 REPORTS</p>		
<p>8.1. Provide reports with the following information: Contractor name, broker name, insurance company, and insurance types</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>8.2. Ability to export reports in .xls, .xlsx, .csv compatible formats. (Contractor's proposal must identify the document types that are supported.)</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

ATTACHMENT A-3 SCOPE OF WORK - CONTRACTOR CERTIFICATIONS

1.0 PURPOSE

The Court is soliciting bids from experienced and qualified companies that can provide Contractor Certification/License management and verification services.

The list below includes a sample, but is not limited to the types of license the Court will track:

- 1) General Engineering Contractor
- 2) General Building Contractor
- 3) Specialty Contractor
- 4) Architects
- 5) Certified Shorthand Reporter
- 6) State Bar of California
- 7) Home Furnishings Licensees
- 8) Trade Certifications (Plumbing, HVAC, Welding, Carpenter, etc.)

2.0 REQUIREMENTS

The successful bidder will provide a complete computerized Contractor License and Certification management and verification service that most effectively addresses the requirements detailed below, including any customization required by the Court:

The System / Contractor must	Can Bidder Provide?	Bidder explanation
	<i>Indicate Supported, Unsupported, Third party or Custom</i>	<i>In the area, provide any explanations, clarification, assumptions, and/or comments</i>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation.</p> <p>Supported: Contractor has the capability and/or offers the service(s).</p> <p>Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s).</p> <p>Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column)</p> <p>Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		

The System / Contractor must	Can Bidder Provide? <i>Indicate Supported, Unsupported, Third party or Custom</i>	Bidder explanation <i>In the area, provide any explanations, clarification, assumptions, and/or comments</i>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation. Supported: Contractor has the capability and/or offers the service(s). Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s). Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column) Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		
3.0 GENERAL REQUIREMENTS		
3.1. Provide web-based pre-qualification services for potential Contractors.	Click here to enter text.	Click here to enter text.
3.2. Validate regulatory forms and contractor licenses.	Click here to enter text.	Click here to enter text.
3.3. Review insurance, bonding, work history, licenses and references. Indicate how often records are updated in your proposal.	Click here to enter text.	Click here to enter text.
3.4. Provide individual user names for each Contractor and Court User. Indicate how Contractors will input their certificates in your proposal.	Click here to enter text.	Click here to enter text.
4.0 SUPPORT		
4.1. Providing initial training/education plan for Court Users	Click here to enter text.	Click here to enter text.
4.2. Provide training for any new software versions or upgrades.	Click here to enter text.	Click here to enter text.
4.3. Tracking system for incoming issues/calls	Click here to enter text.	Click here to enter text.
4.4. Provide live online and telephone support for court users. Support must be available at a minimum Monday through Friday between 8:00 a.m. – 5:00 p.m. PST, excluding State holidays.	Click here to enter text.	Click here to enter text.
5.0 TECHNICAL SUPPORT		

The System / Contractor must	Can Bidder Provide? <i>Indicate Supported, Unsupported, Third party or Custom</i>	Bidder explanation <i>In the area, provide any explanations, clarification, assumptions, and/or comments</i>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation. Supported: Contractor has the capability and/or offers the service(s). Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s). Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column) Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		
5.1. Must be web-based and require no modification or installation of desktop components, (i.e., no client software.) Provide information regarding the technical requirements for the proposed system. The Court currently uses Internet Explorer 8.	Click here to enter text.	Click here to enter text.
5.2. Provide access only via secure and encrypted site and authenticated login and password.	Click here to enter text.	Click here to enter text.
5.3. Maintain unique username and password for each Court User. All activity must be tracked back to the actual, identifiable user.	Click here to enter text.	Click here to enter text.
5.4. The Court must have the ability to maintain, delete and assign user roles.	Click here to enter text.	Click here to enter text.
5.5. Support generally-accepted commercial standards of accessibility features, including but not limited to, the Americans with Disabilities Act (ADA), the Rehabilitations Act of 1972, and all other applicable regulations.	Click here to enter text.	Click here to enter text.
5.6. All product updates should be available at no additional cost. Maintenance and upgrades must be scheduled and performed at a time with the least impact to the procurement processes of the Court. Court hours are 8:00 a.m. through 5:00 p.m. PST	Click here to enter text.	Click here to enter text.
6.0 REPORTS		
6.1. Provide reports with the following information: Contractor name, address, contact, phone number, email address, certifications, license, etc.	Click here to enter text.	Click here to enter text.

<p>The System / Contractor must</p>	<p>Can Bidder Provide?</p> <p><i>Indicate Supported, Unsupported, Third party or Custom</i></p>	<p>Bidder explanation</p> <p><i>In the area, provide any explanations, clarification, assumptions, and/or comments</i></p>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation.</p> <p>Supported: Contractor has the capability and/or offers the service(s).</p> <p>Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s).</p> <p>Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column)</p> <p>Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		
<p>6.2. Ability to export reports in .xls, .xlsx, .csv compatible formats. (Contractor's proposal must identify the document types that are supported.)</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

ATTACHMENT A-4 SCOPE OF WORK – CONTRACT MANAGEMENT SYSTEM

1.0 PURPOSE

The Court is responsible for the procurement of professional and personal services, contract development, contract monitoring, and the management of all of the Court’s agreements and related documents. The Court currently administers over 600 active agreements and currently uses SAP for financial data associated with contracts and vendor payments and SharePoint to track and maintain contract contacts, contract numbers, file folder number, insurance certificates and notices, contract documents, contract values (by fiscal year and/or by calendar year), and other contract information.

The purpose of this RFP is to obtain a computerized contract management software program that will allow the Court to accurately process, manage, track, maintain and report on its agreements, improving customer service to both internal customers and contractors. The successful bidder should have experience providing similar systems to government agencies. The successful software program should, at a minimum, provide for centralized storage of contracts and related documents, improve and streamline the contract development process, promote better collaboration, automate document creation and approval, automate service level contacts with Vendors, have a reminder system for important contractual milestones, provide comprehensive reports including ad hoc reporting, and be able to interface with various software programs that the Court already has in use.

2.0 REQUIREMENTS

The successful bidder will provide a complete computerized contract management system that most effectively addresses the requirements detailed below, including any customization required by the Court:

The System / Contractor must	Can Bidder Provide?	Bidder explanation
	<i>Indicate Supported, Unsupported, Third party or Custom</i>	<i>In the area, provide any explanations, clarification, assumptions, and/or comments</i>
<p>Definition for Can Bidder Provide Column: Please indicate one of the following ONLY. All other text should be included in the Bidder Explanation.</p> <p>Supported: Contractor has the capability and/or offers the service(s).</p> <p>Unsupported: Contractor DOES NOT have the capability and/or DOES NOT offer the service(s).</p> <p>Third Party: Service(s) or requirement(s) can be met but are provided through a third party. (Identify the third party in the Bidder Explanation Column)</p> <p>Custom: Not currently available as a service provided by Contractor; however, Contractor can create a custom response.</p>		

3.0 GENERAL REQUIREMENTS

<p style="text-align: center;">The System / Contractor must</p>	<p style="text-align: center;">Can Bidder Provide?</p> <p style="text-align: center;"><i>Indicate Supported, Unsupported, Third party or Custom</i></p>	<p style="text-align: center;">Bidder explanation</p> <p style="text-align: center;"><i>In the area, provide any explanations, clarification, assumptions, and/or comments</i></p>
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<p>3.1. Provide a web-based and cloud hosted contract management system. The system must be accessible via any of the commercially available web browsers. The Court currently uses Internet Explorer 8.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.2. Capacity to handle multiple authorization/approval channels internally (with or without digital or electronic signature) prior to execution stage of contract or amendment</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.3. Have the capabilities of multiple user levels with access rights management including designating responsible contract administrator and reassignments of contracts.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.4. Ability to create templates for documents</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.5. Ability for templates to be filled in automatically based on end user questionnaire/form input (including Contract Number, Vendor Information, Important Dates, Contract Pricing, etc.) to generate a Contract for any given project and auto-populate repetitive data entry information (e.g. contractor's name) throughout the document</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.6. Organize and filter Contracts by a variety of identifying factors (execution date, expiration date, contract type, document type, organization / category, assigned employees, total contract value, etc.)</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

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<p>3.7. Ability to accommodate and integrate an external digital / electronic signature process (with notifications to Vendors and Internal Signatories) and automatically secure digital / electronic signatures</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.8. Ability to accommodate a physical signature process</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.9. Ability to link a Bid (RFP/RFQ/IFB etc.) to a Contract with a clickable link to access bid information directly</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.10. Ability to display and update Vendor contact information as well as select multiple contracts or Vendor contacts to output contact information into a format compatible with .csv, .xls, or .xlsx. (Contractor's proposal must identify the document types that are supported.)</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.11. Ability to track, record, and display contract / project status, and tracking metrics between status category (i.e. "Contract with Vendor for review", "Contract with Vendor for signature", "Contract submitted for internal signature", etc.) – status categories should be customizable by super users;</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.12. Ability to handle version control for contract negotiation and revision process;</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.13. Ability to track and notify assigned employees of renewal and expiration deadlines in advance;</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

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<p>3.14. Ability to automatically generate a draft renewal document and send it to the assigned employee or designated backup when an Agreement is up for renewal</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.15. Ability for Court super users to customize, edit, and add options to select portions of the system (Contract types, Categories, Status types, Document types, additional information fields, etc.) without access to Source Code or Contractor approval / direction (these customizations should be user friendly to implement)</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.16. Ability to accommodate internal customer requests for project initiation</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.17. Scan, import, and store all documents (from several types of software) related to a contract and relate those documents either to a contractor or a specific contract</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.18. Users should have an option to select document type when uploading these documents</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.19. Notify both the assigned employee and the contractor of pending or missed assignments and/or milestones. These would include, but not be limited to, insurance requirements, reporting requirements, renewals, and monitoring schedules</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.20. Accommodate adequate space for ongoing chronological documentation</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.21. Retain historic information including amendments, in a form of version control</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>

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3.22. Track contract and project status changes over time for reporting the progress of all active projects. This should be a report that can be output weekly and modified based on data within the system.	Click here to enter text.	Click here to enter text.
3.23. Provide generic and ad hoc reporting, and export in a format compatible with .xls, .xlsx or .csv. (Contractor's proposal must identify the document types that are supported.)	Click here to enter text.	Click here to enter text.
3.24. Provide for 'wild card' searching	Click here to enter text.	Click here to enter text.
3.25. Link several contracts to one contractor	Click here to enter text.	Click here to enter text.
3.26. Link several contractors to one contract	Click here to enter text.	Click here to enter text.
3.27. View all documents attached to a contract through this software	Click here to enter text.	Click here to enter text.
3.28. Screen, score and analyze outcomes of proposals from RFP/RFQs	Click here to enter text.	Click here to enter text.
3.29. Provide a notification system to individual employees and, contractors	Click here to enter text.	Click here to enter text.
3.30. Provide comprehensive training for all user roles, e.g., Vendors, Court Users, administrators. Provide a description of training including training materials.	Click here to enter text.	Click here to enter text.
3.31. Provide training for any new software versions or upgrades.	Click here to enter text.	Click here to enter text.

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<p>3.32. Provide live online and telephone support for Court and Vendor users. Support must be available at a minimum Monday through Friday between 8:00 a.m. – 5:00 p.m. PST, excluding State holidays.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.33. Track incoming calls/online support for Court and Vendor users.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.34. Maintain information on problems or events, including but not limited to, problem description, start and end dates/times, actual or potential cause(s), corrective action taken, and future action required.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.35. Training of business administrators, end users, and Court trainers.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.36. User Documentation sufficient to enable a new user to navigate the system screens, to create, update and delete system records, and to run reports and queries; including a section on frequently asked questions.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.37. Maintain a contract library that includes Court’s standard terms, clauses, approved alternatives, dependencies and reusable contract clause templates</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>3.38. Output new contract templates and documents utilizing contract library.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.0 TECHNICAL SPECIFICATIONS</p>		

<p style="text-align: center;">The System / Contractor must</p>	<p style="text-align: center;">Can Bidder Provide?</p> <p style="text-align: center;"><i>Indicate Supported, Unsupported, Third party or Custom</i></p>	<p style="text-align: center;">Bidder explanation</p> <p style="text-align: center;"><i>In the area, provide any explanations, clarification, assumptions, and/or comments</i></p>
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<p>4.1. System must be web-based and cloud hosted, and require no modification or installation of desktop components, (i.e., no client software.) Provide information regarding the technical requirements for the proposed system.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.2. Provide access only via secure and encrypted site and authenticated login and password.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.3. Maintain unique username and password for each Court User. All activity must be tracked back to the actual, identifiable user.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.4. Support multiple access levels and permissions within the system, (e.g., read-only access and read/write access.)</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.5. The Court must have the ability to maintain, delete and assign user roles.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.6. All product updates should be available at no additional cost. Maintenance and upgrades must be scheduled and performed at a time with the least impact to the procurement processes of the Court. Court hours are 8:00 a.m. through 5:00 p.m. PST</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.7. Perform daily system backup and provide for recover from partial and complete disasters</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>
<p>4.8. Support generally-accepted commercial standards of accessibility features, including but not limited to, the Americans with Disabilities Act (ADA), the Rehabilitations Act of 1972, and all other applicable regulations.</p>	<p>Click here to enter text.</p>	<p>Click here to enter text.</p>