



Monterey One Water

Providing Cooperative Water Solutions

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Request for Proposal

for

Enterprise Content Management (ECM) Project

SUBMIT BY MAY 10, 2018



INTRODUCTION

Monterey One Water (Formerly MRWPCA) is the regional wastewater agency for Northern Monterey County, California. The Regional Treatment Plant (RTP) is a 29.6 MGD facility providing wastewater treatment for homes and businesses in the Monterey Peninsula, Salinas, and North Monterey County area. The Agency owns and operates 10 pump stations and operates an additional 18 City-owned pump stations. The Agency also operates the Salinas Valley Reclamation Project (SVRP) tertiary recycled water facility, the Salinas River Diversion Facility (SRDF), and the Castroville Seawater Intrusion Project (CSIP) recycled water distribution system for the Monterey County Water Resources Agency. Additional information about the Agency can be found on our web site <http://montereyonewater.org/>.

PROJECT OVERVIEW

Monterey One Water is seeking to acquire an enterprise content management (ECM) system that allows employees to:

-) Efficiently capture information and automate classification, eliminating the need for manual sorting and processing.
-) Securely and efficiently search, retrieve, scan, store, e-mail, and manage multiple types of content, including but not limited to electronic and imaged documents, audio and video files;
-) Automate content-related business processes such as utility billing, permitting, and purchasing.
-) Archive records and apply formal retention schedules for effective information governance.

There will be 25 users across the following departments:

1. Finance
2. Administration
3. Human Resources
4. Information Technology
5. Customer Service
6. Engineering
7. Source Control

The ECM system will integrate with the following software applications:

-) Eden from Tyler Systems
-) Microsoft SharePoint Online
-) Lucity CMMS

C. Project Objectives

The objective of an ECM implementation is to provide a standard system architecture and methodology for managing content and metadata and automating business processes across the organization.



Monterey One Water has identified the following as key project objectives:

-) Improved Document Management – Reduce the need for other agency departments to maintain duplicate documents, ensure compliance with document retention and accessibility policies, improved information security and disaster recovery.
-) Business Process Improvement – Streamline business processes, reduce staff workload and shorten business process timelines with Workflow and Electronic Forms.
-) Increased Efficiency and Staff Productivity – increases document accessibility, decrease the possibility of lost files and misplaced information, and streamline integration and deployment.
-) Cost Savings – reduce printer and copier costs (paper, toner, and copier maintenance contracts).
-) Enhanced Customer Service – Improve access to public records and online access to agency records via web access.
-) Space Savings – Minimize paper files and office space storage.

II. RFP Timeline and Requirements

The following is a high-level RFP response timeline that is subject to change. Specific project timelines will be developed with the successful Respondent after selection.

Request for Proposal Issued	April 10, 2018
Requests for Clarification Due	April 24, 2018
Proposals Due	May 10, 2018

All questions related to the project requirements and requests for clarification must be submitted in writing to the following person by April 24, 2018.

Larry Stowbunenko
 Information Systems Manager
 5 Harris Court, Bldg. D
 Monterey, CA 93940

Questions may be e-mailed to larry@my1water.org

If your firm intends to respond to this RFP, proposals are due by 5:00pm PST on May 7, 2018. Proposals must be sent in pdf format. If submitting a hard copy proposal, please send 6 (six) copies.

Please include the following components in the proposal:

-) Cover Letter
-) Vendor Profile, including:



- Description of firm
- How long the vendor has been in the business of developing and supporting ECM software
- Number of organizations that currently use your ECM software
- The number of new organizations that contracted with your company for ECM software in the past two years
- Provide information (such as financial statements) that shows the stability and financial strength of your company
- Staff qualifications for each of the key staff who would be assigned to this project
-) Five (5) current references of organizations with similar systems, including:
 - Project dates
 - Scope of project
 - Summary of solution provided
 - Reference contact information
 - Include at least one new or recent customer and at least one water\wasterwater utility
-) Executive Summary – Section B
 - Provide a narrative response to the high-level system overview.
-) Scenarios – Section D
 - Provide an overview description of how your ECM system would solve the needs identified in the scenarios.
-) Functional and Technical Requirements – Section E
 - Outline which requirements your system does or does not meet.
-) Services Required – Section G
-) Cost Detail and Summary Pages – Section H
 - Outline your pricing structure.

Please submit the response in pdf format. Please note that the costs proposed must be valid for at least 90 days beyond the proposal due date.

III. Scope of Services

A. General

Except as otherwise provided herein as the responsibility of Monterey One Water, the successful proposer will provide all services, software and materials to successfully install and implement an enterprise content management system in accordance with the provisions of the resulting agreement between the parties.

B. Executive Summary

1. The ECM project will be distributed over a three-year time period. The initial phase will only include the Administration department and a minimal number of users for testing and evaluation.
2. The ECM system must be robust and scalable, so that it can provide a unified tool for managing content across the agency. There are currently 86 employees in the organization.



For the purposes of this RFP, there will be 2-4 initial users of the ECM system.

3. Monterey One Water will consider both a solution made up of one tool or a suite of software tools that can operate together in a seamless way to provide enterprise content management functionality.
4. Monterey One Water prefers to purchase commercial off-the-shelf software, but will consider software that may require some minimal level of customization to ensure that the software links easily to other applications and systems currently in use. Extensive customization is not desired.
5. Databases and equipment requirements should be non-proprietary. Storage of electronic documents in an archival, non-proprietary format is necessary. The system must easily create images of electronic documents and import them into the system. Storage of electronic documents in their native file format is necessary.
6. The ECM system must include integrated capture that can accommodate both hard copy and electronic documents. The ECM system must accept documents from the Microsoft Office suite of products including Office 365, as well as other types of files such as maps, photographs, scanned images, sound and movie formats and Web pages. The system must be able to automatically extract metadata from captured content.

C. Technical Environment

Any solution adopted as a result of this RFP will have to work within Monterey One Water's technical environment and may need to integrate with existing systems. A description of the organization's current technical environment follows.

Technology Standards	Current
Disaster Recovery	SAN replication, DR Appliance, Cloud storage.
Business Application Environment	Tyler Eden ERP including accounting software, utility billing, permitting, Timekeeping and Human Resources. Lucity CMMS, Civic Clerk Agenda Management, Office 365.
Desktop Hardware	Dell core i5 or i7
Email System	Exchange Online (Office 365)
Geographic Information System (GIS)	Esri ArcGIS, desktop and server
Handheld Devices	Android
Internet Browser	Chrome, Edge, IE
Relational Databases	MSSQL 2016
Server Hardware	Dell Poweredge R630
Server Virtualization	VMWare 6.5
Server Operating Systems	Windows 2012 R2



D. Scenarios

A number of scenarios have been identified below as opportunities for significant improvement organization-wide. In a short narrative (two pages or less):

-) Summarize the software modules that would be appropriate (e.g. workflow, records management, e-forms, etc.) for use in each scenario.
-) Describe the extent of standard configuration versus custom programming/interfaces that might be required (e.g. out-of-the-box, vendor customization required, third-party applications already developed for particular use, etc.).
-) Describe a similar existing solution using the proposed ECM system.

In responding to the scenarios, proposers should, whenever possible, use a similar operating environment to Monterey One Water's. Proposers should make a case for the use of their solution and the value that the proposer brings.

1. Monterey One Water is interested in implementing an archive retrieval solution for Freedom of Information Act (FOIA) requests. This should incorporate any stored documents as well as accessing our email archive appliance if possible.
2. Currently, the purchasing process is manually intensive. The agency would like a workflow solution for the purchasing process including requests and invoices.
3. Our Customer Service department is responsible for tracking data on approximately 55,000 parcels. Much of that data is stored on paper in file folders. The agency would like to transfer the existing documentation to the ECM system and develop a process to add any new documents to the system.
4. The agency has a manual procedure in place for contract review. Contracts must be reviewed by the department head, assistant general manager, and the agency attorney. Revisions are often made and notes included as the contracts are reviewed. What solution do you propose to route the contract electronically allowing for notations and revisions by the reviewing parties? Also, if the process were to become electronic how would individuals be notified that a contract is ready for review and how would the administrator know where a document is at any given time? What are the options for electronic signatures?
5. Currently, the Accounts Payable, Purchasing and General Ledger processes are manually intensive. The Agency would like a workflow solution for these processes including but not limited to accounts payable invoices, approvals, purchase order requisitions, journal entries as well as attaching back up documentations to different transactions prior to archiving them for future retrieval.
6. The Agency would like to have more electronic forms to speed up processes and workflow. Forms such as the Travel Request Form are initiated by the employee, approved by supervisor, occasionally approved by AGM or GM, and finally by HR. Other



forms with a similar process are staff addition requests, salary changes, and requisitions. Our personnel files contain many documents and many of them do not contain sensitive information. It would be more efficient to eliminate the need to file items such as DMV printouts, awards, certificates, jury duty documentation, interview notes, etc. However, only staff from the HR department would like to have access to these documents.

E. Functional and Technical Requirements

Please see the Technical Requirements spreadsheet

F. Hardware Recommendations

Identify the hardware necessary for ECM system implementation, including and product-specific required hardware for:

-) PCs, both user (retrieval) and scan/index stations (specifications only)
-) Server(s) (specifications only)
-) Scanners (provide recommended scanners)
-) Other hardware

G. Services Required for the Project

1. Implementation

- a. Describe your implementation methodology. Is your method flexible enough to incorporate changes during the implementation process?
- b. Submit an implementation plan for planning, designing, installing and configuring the core system. Explain how and when end-user feedback is incorporated into your plan.
- c. Identify roles and responsibilities (e.g. team lead, product owner, technical expert, etc.) for the successful proposer and <organization's> business and technical resources needed by stage.
- d. Do you provide a central point of contact during implementation?

2. Training and Certification

- a. Describe the training available and state whether you will provide it onsite. Provide costs for onsite vs. remote training.
- b. Describe your training program for end users, system administrators and workflow developers prior to going live.



- c. Provide details on recommended system-specific training and certification courses—either online or in-person—including course name, description, location and duration.
3. Service, Maintenance and Ongoing Support
- a. Describe the warranty or maintenance program offered with your product(s).
 - b. Describe how problems are prioritized.
 - c. Describe the problem escalation process.
 - d. Provide information on your guaranteed response time to reported problems.
 - e. Describe how you will allow us to maintain self-sufficiency in supporting and expanding the implemented solution.
 - f. Describe the resources that are available on your support Website.
 - g. Describe any active user groups, discussion forums and additional means of solution exchange with other customers.
 - h. Describe your process for rolling out new versions and/or updates to your customers.
 - i. Describe your process for training customers on new versions.
 - j. Identify the current version of the software and the anticipated release date of the next version. What new features will the next version support?
 - k. Describe the measures, if any, your company takes to encourage customers to stay on the current version of the software.

H. Cost Proposal

Software/Installation/Training/Support Costs

Include vendor's software, installation, training and support costs as well as any additional system software needed. Please submit an itemized list of all costs. Vendor must indicate how support will be provided (phone, on-site, etc.). Vendor must permit software to be installed on a development server to ensure updates and changes work correctly before being implemented.



Technical Requirements

Please respond to each line item with a support selection (unless non-applicable). Each line item should include a short response describing the functionality in the system. If a reference to an attachment is made, please include the name of the attachment. Please return this document in the same format.

Availability Criteria

- Yes - feature is standard and supported out of box.
- Not Available - feature does not exist and not scheduled for an upcoming release.
- Coding Required - feature is not available as standard offering but possible using code.
- Future Release - feature is scheduled for next product update.
- Third Party - feature supported through an existing third-party tool or integration.

Item	Capture	Response
Capture		
Does the product work with a wide variety of scanners?		
Can you use hybrid and specialized capture devices such as copier-scanners and microfilm scanners?		
Can you import photos from digital cameras or mobile phones, and straighten warped or curved images to generate clean, usable OCR text?		
Are you able to capture images already stored on your computer or network folders and process them as you would scanned images—including basic image enhancement, OCR and metadata?		
Does the system auto-name documents while scanning according to user, date or field values?		
Can you scan additional pages into existing documents?		
Can you perform image adjustments to remove noise, remove lines, crop, rotate and perform other image clean-up?		
Does the system automatically remove blank pages?		
Can you archive electronic documents including images, text, spreadsheets, PDFs, movies, AutoCAD and sound files in their native file formats?		
Can you send documents to the system from Windows® Explorer™?		
Can you save directly from Microsoft® Office such as Word, Excel and PowerPoint?		
Can you store directly from Outlook and automatically map the email's metadata to your fields?		
Can you automatically create TIFF images from PDF documents?		
Does the system support mandatory metadata acquisition?		
Can you import electronic documents and directories by dragging and dropping?		
Can you export and import documents, folders, annotations and their metadata by using briefcases?		



Item	Capture	Response
Can you convert electronic documents to archival images without printing and scanning them?		
Can you extract text from electronic documents?		
Can you create new folders directly from the Import dialog?		
Is there Unicode support to handle documents in non-English languages?		
Is there form alignment and dropout for precise zone OCR?		
Can you extract template and identification data from images?		
Can you extract data by OCR, zone OCR, bar code recognition or Optical Mark Recognition (OMR)?		
Can you query an external database based on a unique value to minimize data entry?		
Can you use extracted data for document or folder naming, indexing or as input to other processes?		
Does the system identify documents by recognizing forms or by matching extracted data?		
Does the system use identification for document separation or individualized processing?		
Can you imprint images with Bates numbers, lookup data or bitmaps?		
Can you schedule document uploading to the repository?		
Can you start a scanning session automatically?		
Can you set security on your scanning sessions to prevent any changes?		
Can you automatically redact specific patterns on the document, such as social security numbers, regardless of location?		
Can you highlight, stamp or place a sticky note on the document upon scan?		
Can you capture content from a third party application via a print spool or hot folder?		
Indexing		
Does the system support field values on any document or folder?		
Can you create different templates for distinct document types?		
Are there constraints forcing users to enter field information in specified formats?		
Is there color-coding to distinguish document types?		
Can you reassign or update templates or fields at any time?		
Are selection lists available to standardize template entries?		
Can you auto populate template information to documents from parent folders?		
Does the program support simultaneous OCR from multiple workstations?		
How many languages are supported by the OCR?		
Does the system support multi-tier, dynamic fields? For example, field "City" displays values based on the "State" field chosen.		
Can you pull a field list from a database?		
Can you use tokens to auto populate information on the field?		
Can the system automatically populate field values from a database based on a key field value?		
Can you mark fields as required?		
Can you create comment fields and automatically insert the username, date and time after a comment is inserted?		
Can a field be marked as a multi-value field?		
Search and Retrieval		
Are template field searches supported?		
Do full-text searches cover the entire repository?		
Are fuzzy searches supported?		
Can you automatically perform the most commonly used searches (text, field, annotation and name), as well as custom searches, from a Google-style toolbar?		



Item	Capture	Response
Can you search by tags, volume, creation or modification date, note text, versions, comments or other criteria?		
Can you save search criteria for repeated execution?		
Are proximity searches supported?		
Can you perform name searches by document or folder?		
Can you combine search criteria to narrow results (Boolean searching)?		
Can you limit search results by folder?		
Are search terms highlighted to show their precise location within returned documents?		
Can you save search results in folders for quick reference and easy access?		
Is there a line of context display to show how the word or phrase is used without retrieving the entire document?		
Can you share a search via a URL?		
Distribution		
Does the software offer a flexible print configuration?		
Is there accurate scaling of print output to match the original document?		
Can you e-mail images as TIFF or PDF?		
Is cross-platform retrieval with standard Web browsers supported?		
Are mobile users supported with apps for smartphones and tablets?		
Can you distribute and archive records on non-erasable media?		
Can you distribute documents on royalty-free DVDs, flash drives or portable hard drives?		
Can you distribute content on a portable, offline stand-alone client with searching capabilities?		
Does the system provide a full-featured browser-based client (thin client)?		
Can you create published repositories based on search results?		
Can you drag and drop documents into e-mail?		
Can you share documents using shortcuts or URLs?		
Can you export electronic documents in their native format?		
Can you compress large files in an e-mail?		
Can you encrypt PDFs before e-mailing?		
Document Management		
Is there an intuitive folder view to make organization easy and flexible?		
Can you display document names, template fields and volume information in the folder browser?		
Can you display a preview pane and display the document, metadata and text without opening the document?		
Can you track document versions?		
Can you compare different versions?		
Can you revert to previous versions?		
Are there check-in/check-out capabilities?		
Is there support for dockable windows, or flexible viewing of images, text, thumbnails and template fields?		
Can you establish document linking relationships? For example, email attachments are linked to the e-mail.		
Can public and private folders be set up to allow document sharing, mail folders and ad hoc workflow?		
Can users place sticky notes on documents with searchable text and hyperlinks?		
Can you stamp images with customized or predefined graphics?		
Are annotations image overlays that do not modify the original document?		
Are there informational tags to alert users to special properties?		
Can you display black and white, color or grayscale images?		
Can you edit text files created by OCR?		
Does the software support full panning, rotation and contrast?		



Item	Capture	Response
Can you start a business process/workflow from the client?		
Can you view the current steps required for a business process?		
Can you preview the document within the folder browser?		
Can you change the colors on folders?		
Can you export the list contents to run reports with a csv file?		
Can you rearrange pages in a document or create a new document from a page using drag and drop?		
Can you display documents side by side?		
Can you customize toolbar icons with specific action icons or external applications?		
Can you change the browser's font and size?		
Does the system support a work queue folder for documents pending approval?		
Records Management		
Is the system DoD 5015.2 certified?		
Is the system VERS certified?		
Does the system offer a DoD 5015.2-certified integration with SharePoint 2010?		
Can you integrate records management, document management and workflow in one environment?		
Can you create records from documents already under management?		
Can you manage physical records alongside scanned images and electronic documents?		
Can you manage digital video, audio and other electronic files?		
Can you define records series from an intuitive interface?		
Can you describe locations of transfers for records series?		
Can you track current locations of transferred records?		
Can you screen records for eligibility for transfer, accession or destruction?		
Can you confirm destruction of eligible records?		
Can you find records according to status or location?		
Can you specify multiple events that are necessary before records can be cut off?		
Can you specify trigger events determining which retention schedules apply to records?		
Can you configure retention schedules so that superseded records are sent into final disposition?		
Can you auto-classify and auto-file incoming records?		
Can records managers configure the look and feel of the records environment to suit business unit requirements while preserving original records in the formalized records management environment?		
Does the system provide event based cut-off instructions?		
Does the system provide time based cut-off instructions?		
Does the system allow you to specify years and months for the retention period?		
Does the system support back-file compatibility? Can you change the file date?		
Does the system support a non-recoverable destruction of a record?		
Does the system allow you to keep the metadata when a record is destroyed?		
Does the system allow you to track physical records?		
Can you search for records due for cut-off, destructions, accession and frozen records?		
Can you place a freeze or hold on a record?		
Can you set a review date for vital records?		
Can you change the properties for individual records?		



Item	Capture	Response
Business Process Management		
Are you able to model work processes with an intuitive graphical interface with drag and drop functionality?		
Can you automate document movement with rules-based routing?		
Does the system include a number of built-in activities to simplify workflow configuration?		
Can you maintain productivity with automated e-mail notifications?		
Is workflow tracking available to improve accountability?		
Can you accommodate ad hoc participation in the workflow environment?		
Can you design your own workflow activities?		
Does the system support security on the Workflow server to prevent unauthorized changes?		
Does the Workflow engine support exception handling?		
Does the Workflow support a try-catch activity in the case a workflow receives an error?		
Does the Workflow support and include any web services for integrations?		
Does the Workflow include database activities to easily push and pull information from another database without any code?		
Does the Workflow support retrieving and inserting data into PDF Forms?		
Can you run a workflow based on an event in the repository or based on a schedule?		
Can an administrator terminate a workflow manually?		
Can one workflow invoke another workflow?		
Does the Workflow display error or warning messages for each workflow run?		
Can you graphically see the current step in an active workflow?		
Can you assign security on documents and folders dynamically?		
Can one Workflow server connect to multiple servers and repositories?		
Can you export/import a workflow?		
Can you OCR with Workflow?		
Can you send email notifications and is the email editor HTML enabled?		
Can you add/delete documents from a SharePoint document library?		
Do you offer any calculation activities, such as date or arithmetic?		
Does the Workflow support regular expressions to retrieve specific values from a string of text?		
Can you start a Workflow from the Workflow designer and track token values?		
Integration		
Are out-of-the-box integrations included with the Microsoft Office suite, including Word, Excel, PowerPoint, Excel and Outlook?		
Are built-in activities available to automate the process of retrieving and updating information from third-party databases?		
To simplify integration, can you access any document stored in the repository with a unique URL or entry ID?		
Can you access documents stored in the repository through Web Folders and other WebDAV extensions?		
Can you customize Web interfaces built on ASP.NET?		
Does the company support a marketplace of current integrations or enhancement applications?		
Do you offer an API that supports .NET, C# and Java libraries?		
Is a Code Library available to jump-start custom integrations from working examples with complete code samples?		
Does the system support REST web services?		
Administration		



Item	Capture	Response
Does the licensing model include unlimited servers and repositories to support active clusters, offsite mirrors, test and development servers, data segregation, and multiple servers for remote offices or secure data?		
Does the licensing model offer volume discounts?		
Are unattended installs supported?		
Is the system Section 508 compliant?		
Is the system administered through a Web-based Administration Console that can be accessed from anywhere?		
Does the Administration Console provide a snap-in for Microsoft Management Console?		
Can you troubleshoot with Event Tracing for Windows (ETW), supplemented by HTTP logging and real-time "console mode"?		
Is the error and warnings reporting system integrated with the Windows Event Log?		
Can you automate administrative tasks with Windows PowerShell through Windows Management Instrumentation (WMI) or .NET interface?		
Can you integrate with Active Directory and automatically synchronize AD groups and users?		
Can you create and configure templates/fields with minimal to no technical knowledge?		
Do your web products support IIS?		
Can you distribute system options to select users or everyone? For example, saved searches, column profiles, and import options.		
Can you set a password policy on system users?		
Can you automatically log users off after a period of inactivity?		
Can you prevent users from seeing a repository on the network?		
How often are updates released?		
Do you offer an installation wizard for any updates and hotfixes?		
Can updates and hotfixes be downloaded by the organization from the support site?		
Storage		
Is the location of document data fully configurable and storable on any network location by UNC path?		
Is there a separate document folder hierarchy from physical storage volumes?		
Can you configure volume size and set rollover limits?		
Is there full support for rewritable, read-only, removable or fixed volumes?		
Can you migrate documents to different physical volumes?		
Can you set document content files to read-only for magnetic WORM support?		
Can you transfer document storage volumes with metadata and folder organization intact?		
Can you attach large numbers of documents via portable volumes for additional synchronization?		
Does the system store documents in non-proprietary TIFF and ASCII formats?		
Does the system support SQL and Oracle databases?		
Security		
Are there storage and security measures supporting regulatory compliance?		
Are there privilege rights controlling administrative functions?		
Are there feature rights controlling functions like scanning, printing, searching and importing?		
Are there access rights determining the level of access to documents and folders for users or groups?		
Are there volume access rights determining permission to import data volumes?		
Are there field access controls limiting users' ability to see and edit fields?		



Item	Capture	Response
Can you determine effective rights for any user?		
Are rights enforceable for both users and groups?		
Can you enforce password policies, including length, complexity and duration of passwords?		
Are you able to configure maximum idle time before users are automatically logged out?		
Can you allow or deny security rights explicitly through inheritance?		
Is inheritance controlled through flexible scoping options?		
Do security tags place special restrictions on documents and folders?		
Are you able to securely redact sensitive portions of documents?		
Are there various levels of audit tracking for compliance and accountability?		
Can you control security permissions centrally or delegate to department heads?		
Are digital signatures available?		
Is there native support for single sign on?		
Does the system support SSL for secure communication?		
Can you secure deletions with DoD 5022.22 M-compatible deletion protocols?		
Is there a secure recycle bin with administrative control?		
Can you force printouts to include security watermarks for tracking origins?		
Can you require users to indicate the reason for document export?		
Can you track all successful and unsuccessful activity in the system and write it on a log file? For example, sign on, opened document, changed metadata, deleted and modified system configurations.		
Can you generate web-based audit reports, available as tables or charts?		
Is SQL reporting compatibility available, so you can generate audit reports with Microsoft SQL Server Reporting Services?		
Does the system have native and third party encryption on the volumes?		
Does the system allow you to set security so users can only access the information through the ECM client?		
Forms		
Does the system provide an intuitive electronic Forms module?		
Is the Forms tool WYSIWYG?		
Can you create forms by dragging and dropping preconfigured fields?		
List the types of preconfigured fields available		
Can you upload documents to the Forms and import it into the repository?		
Can you easily create field rules? For example, selecting YES will display an "Explain" field.		
Does Forms support querying a database based on a field value to auto populate fields with existing information?		
Can you secure the form to prevent unauthorized access?		
Does Forms support variables to share information from one form to another?		
Does Forms include a process modeler based on BPMN?		
Can you easily create a workflow from Forms to route it from one user to another?		
Does the Forms BPM support exception handling?		
Can users insert comments when approving a form?		
Can you secure forms with authentication and allow certain users/groups access to the form?		
Can you make forms publicly available?		
Can you fill out a PDF form based on the form submission?		
Can you insert text above or below the field without coding?		
Can you use CSS and JavaScript to extend the functionality of Forms?		
Can you use HTML code on your form fields?		



Item	Capture	Response
Do you provide an iFrame code to easily incorporate it on another website?		
Do you provide a “tasks” page with a list of forms that require your attention?		
Do you provide a “start” page with a list of forms you can initiate?		
Do you provide a “submissions” page with a list of forms recently submitted by the user?		
Do you provide an intuitive tool to configure the colors, fonts and pictures on the form?		
Is the Forms tool written in HTML5?		