

Attachment (A) – ERP Technical Requirements
 RETURN THIS FORM WITH PROPOSAL

	A	B	C	D	E	F	
1		Technical Requirements					
2	Importance	Requirement	Fully Supportive/Included/Configurable x 10	Partially Supported x 6 (comments required)	3 rd Party Product Snap-in x 2 (vendor and product name required)	Not Supported x 0	Description or Comments
3		General					
4	H	Ability to view converted and migrated historical information from existing systems for read-only reference (data does not need to be transactional). Please indicate other data import sources we can use.					
5	H	System is 100% web-based and web-accessed (VPN access not needed to use the system).					
6	M	System leverages Microsoft Word and Microsoft Excel where appropriate, and employs MS Outlook and MS Teams for email notifications and calendar integration for appropriate events (i.e. scheduled inspections would appear on an inspection outlook calendar).					
7	M	System provides a centralized data dictionary that fully describes table structure and appropriate levels of metadata.					
8	M	System in both agency and cloud options provides a minimum of 99.9% uptime excluding scheduled maintenance.					
9	M	The vendor provides a Software Development Kit (SKD) to allow staff and others to customize and configure new applications based on the vendor's system.					
10	H	System provides for an Application Programming interface (API) or Web Services interface for processing third party electronic payments. Please indicate any Merchant Fee information in the Comments field.					
11	M	System supports and is compliant with Service Oriented Architecture (SOA)					
12	H	Automatic logs of an inactive user after a specified period of time, determined and controlled by the system administrator.					
13	H	Provides industry standard Application Programming Interfaces (API), adapter development kits, or similar enterprise application integration (EAI) tools to facilitate data transmission and exchanges.					
14	L	Can the records be exported to another system?					
15	M	Can the records be purged from the system in compliance with a retention schedule?					
16	M	Can records be removed from the system?					

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17		System					
18	H	System uses network logon credentials and MS Active Directory to assign permissions.					
19	H	System has role-based security where users can be assigned multiple roles – modify, view, or to restrict access control.					
20	H	Must be able to add, change, and cancel permissions for the system access at any time.					
21	H	System administrators have the ability to grant specific users with certain administration rights such as granting access rights/permissions to other users.					
22	H	System allows access/security configuration settings by department (including giving access rights to specific permits, records and functions of the system.					
23	H	Managers (role/permissions) have the ability to view all of their staff's work schedules and assigned/re-assign activities as needed.					
24	H	System provides adequate security functions to handle web-based transactions without compromising the integrity of the system.					
25	H	Ability to have user groups. One user could belong to more than one group. Privileges should be defined at user level and at user group level.					
26	H	Ability to cancel inactive accounts with pre-set expiration days or after a number of days.					
27	H	Ability to support automated logout of users based on specified inactivity and idle timeout periods.					
28	H	Ability to specify the amount of time before a user session times out.					
29	H	Ability to have adequate security features to restrict changes to records based on defined criteria (e.g. stage in workflow) with override capabilities.					

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30	H	Ability to prevent users from permanently deleting records and instead make them inactive or hidden, e.g., this allows the removal of records created in error, the ability to undo deletions, and maintain an audit trail.					
31	H	The ability to change the default administrator or SA account name and password.					
32		Security (on-site)					
33	H	Ability to support system administration for end-user management to assign role based security access rights (e.g., add, delete, change, modify access levels and groups).					
34	L	Ability to integrate with single sign on (SSO).					
35	H	Ability to authenticate with AD (MS Active Directory).					
36	H	Ability to use encrypted communication (e.g., TLS, SSL) for all application functions, including traffic between application tiers.					
37	H	Ability to be fully PCI-DSS v3 compliant for any part of the system architecture that handles, transmits or stores (even temporarily) credit card and payment data.					
38	H	Ability for the application to handle payments through integration with an external provider, without storing any payment or card-holder data.					
39	H	System is fully PII compliant.					
40	H	System provides access to audit trails for authorized users based upon the user's security profile.					
41	H	Authorized users have the ability to print audit trail information.					
42	H	Please indicate formats available for exporting the system log information.					
43	N/A	Please describe how you support vulnerability scanning.					
44	N/A	Please describe how you handle patching for the proposed software, and compatibility with Microsoft Patches.					

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45		Data Structure					
46	H	Utilize database best practices for table indexing to optimize system performance.					
47	H	Uses human-readable table and column names to support ad-hoc queries and reporting.					
48	H	Data is not in a proprietary format, and can be query and extracted using standard tool to allow for use in Open Data initiative.					
49		Government of Guam Hosted / Self -hosted					
50	H	Ability to deploy the application hosted locally. (In Description, provide three (3) locations (jurisdictions) where the system of similar size and complexity has been deployed as a local solution).					
51	H	Ability to support sufficient hardware infrastructure for high availability, load tolerance, real-time failover, and integration with a disaster recovery infrastructure including, but not limited to service configuration, central data storage configuration (SAN), and network configuration. (Describe relevant details and recommendations in Description).					
52	H	Ability to support additional non-production environments for development, disaster recovery, test/staging, and training. These additional environments should be covered by the production license.					
53	H	Supports a Window 2012 or above and 64-Bit operating system.					
54	H	Supports a 64-Bit Microsoft SWL Server 2012 above DBMS.					
55	H	Supports native connectivity (as opposed to ODBC) between application and the DBMS					
56	H	The Tier 1 and 2 are capable of running in virtually hosted server environment (VMware VSphere 6.0).					
57	H	Ability to support hardened virtual images.					

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58	H	System supports cloud Backup and Recovery software (Evault) including the ability to back up the database while in use if internally hosted.					
59	H	Ability to support additional non-production environments for development, test/staging, and training. These additional environments should be covered by the production license.					
60	M	Ability to refresh training environment from production using a utility to migrate setup from one environment to another.					
61		Cloud/SaaS					
62	N/A	Ability to deploy the application hosted by vendor (SAAS), (In Description, provide three (3) locations (jurisdictions) where the system of similar size and complexity has been deployed as an SAAS solution).					
63	N/A	Who owns/manages your data center (i.e. Amazon)?					
64	N/A	Who manages the infrastructure upgrade?					
65	N/A	Who manages the product software solution upgrades?					
66	N/A	How does product upgrading versioning work (can the government have a version that is different from other cloud customers)?					
67	N/A	Level of product customization allowed?					
68	N/A	Average number of code deployments and software upgrades annual?					
69	N/A	Detail the process to switch between on premise and a SaaS deployment.					
70	N/A	Data Residency (the government requires USA)?					
71	N/A	Ability to export data? What formats?					
72	N/A	What are the data storage costs associated with the solution (i.e. user, type, etc..) Do you provide monthly or semi-annual reporting of our storage usage?					

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73	N/A	What are the Backup/Recovery Fees?					
74	N/A	Do you offer a Sandbox or Test environment? What is the fee?					
75	N/A	What is the band-width? Is this limited?					
76	N/A	Do you offer Encryption of data at rest? Data in Transit?					
77	N/A	Other fees that apply (i.e. custom objects, sessions, page views, characters, etc....)					
78		User Interface/Experience					
79	H	Ability to automatically spell check text fields and text entry, to indicate unrecognized words, and to add entries to the dictionary.					
80	M	Ability to perform operations on multiple records at the same time from one screen/view, such as updating the same field in every record or for a specified group of records.					
81	H	Ability to provide contextual help within the user interface, allowing quick access to point-by-point instructions to describe tasks or functions for selected fields or actions performed as well as the full use manual.					
82	L	Ability to personalize user experience, e.g., favorites menu, custom forms, queries, look ups, quick reports, personal history on screen widgets, etc., Specify features that can be personalized.					
83	H	Ability to integrate the government permitting system banner and city logos into the system's user interface.					
84	L	Ability to customize the UI by overriding the system default style sheets.					
85	M	Ability to clearly alert all users when the system is down (or not accepting submittals) or when scheduled to be down. System should be able to notify users who are logged in to warn them in advance of the system becoming unavailable, and allow them to save their work.					
86	H	Ability to copy/paste into data entry fields and from data entry fields into commonly used software systems (i.e., MS Office, MS Outlook, Visio).					

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87	H	Ability to provide visual cues for required fields.					
88	H	Ability to notify user when action is required to save changes before proceeding.					
89	M	Ability for customers to save incomplete business functions and resume progress at a later time.					
90	H	Ability to select data from configuration drop-down or pick lists that can be populated from the database to ensure data consistency.					
91	L	Ability to Undo prior actions.					
92	M	Ability to clone existing entities/objects (e.g. projects, assets, reviews, permits) for use on similar entities/objects.					
93	H	Ability to pre-populate / auto-populate defined fields based on stored data (i.e., pre-populate customer address info when customer number is selected, etc.).					
94	M	Home page to view and manage all assigned activities to that individual user (i.e. pending applications for review, pending inspections, permits requiring plan checks, etc.).					
95	M	Ability to limit display of only those modules and pull-down menus that the user is authorized to access.					
96	H	Integrated seamlessly with consistent “look and feel” user interface across modules and activities to minimize training and administration.					
97	H	Ability for Government IT Support Administrative staff to modify parts of the system as needed without having to call upon the vendor or outside technical resources (menus, fields, screens, workflow, etc....).					
98	H	Ability to standardize data collection for fields via pull-down to simplify data entry and ensure data consistency.					
99	H	Ability to display historical information associated with records such as a case, project or other record type, which is viewable by authorized staff.					

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100	H	Ability for users to flag records such as applications, renewals, cases work orders, license, client, etc., that have outstanding issues.					
101	H	Automatically flag records such as properties, and/or sends out advisory notification such as when ownership change information is updated on properties with pending activities.					
102	H	Ability to have both public and private notes associated with records such as each customer file, property, project, permit, licenses, case, etc.					
103	M	Provides for easy navigation to view, create or modify records from anywhere within system.					
104	M	Easy access to documents associated with records such as a given permit, property, contact, etc.					
105	M	Supports the export of data in a format (access, excel, tab delimited, html, etc.) that can be imported and analyzed using statistical analysis software. System allows a user based on defined roles to specify fields and date ranges of data for export.					
106	H	Ability to attach documents and photos on any record (case, permit, address, or parcel). System time stamps all such attachments. System also attaches address and parcel identifier to photos.					
107	L	Ability to read and edit geotagged attributes in photos.					
108	H	Ability for non-system documents and photos to be "attached" to addresses and other system records for easy viewing, including but not limited to MS Office application documents and files, .jpps, .gifs, .pdf, .txt, .rtf, .bmp.					
109	H	Requires user confirmation for operations that result in the deletion of any system record, or function that was created by that user. Records should be marked as inactive and an audit trail should exist.					
110	M	Ability to identify pending work assignments easily and quickly display and print on a map. Mapping can be for all open or pending work or a specific record type, division, and/or block or map selection (polygon). Records past due (overdue) are plotted in different colors from other pending work.					
111	M	Batch functionality can be configured on a job-by-job basis to execute at any time during the day.					

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2							
112		Interfaces/Integration					
113	H	Ability to integrate/interact with standard Microsoft Office products, including Word, Excel, Access and SharePoint. Specify which versions are supported & capabilities enabled.					
114	H	Ability to integrate/interact with Microsoft/Outlook (Calendar schedules, inspection appointments)					
115	H	Ability to integrate with DocuSign /Adobe Acrobat.					

Attachment (B) – ERP Financial Transactions Requirements

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1		Financial Transactions Requirements					
2	Importance	Requirement	Fully Supportive/Included/Configurable x 10	Partially Supported x 6 (comments required)	3 rd Party Product Snap-in x 2 (vendor and product name required)	Not Supported x 0	Description or Comments
3		General					
4	H	System provides effective dating of all financial transactions completed in the system including an audit trail tracking all financial actions including modifications to financial elements and data.					
5	H	Ability to take payment in person and online.					
6	H	System loads, tests, and stores revised fee schedules to be implemented in the future.					
7	H	Ability to integrate payments received to the Agency's financial system (CGI-AMS 3.10).					
8	H	System manages Trust Accounts whereby large payments are received in advance by Contractors from which funds are drawn to credit fees due.					
9	H	System handles all transactions involving bonds and bond refunds and to relate them to permits and other types of applications.					
10	H	System calculates fines and interest.					
11	H	System reverses a transaction and all related allocations and records this action permanently as part of the system audit trail.					
12	H	System tracks and automatically calculates all fees (include complex) related to the permitting, planning, zoning, licensing and enforcement processes at any point dictated by the business rules.					
13	H	System calculates fees based on configured fields.					
14	H	System automatically determines fees from codes based on business rules configured based on Code Ordinances.					
15	H	System tracks all transaction history (renewals, bills, payments, penalties, late fees, etc.) associated with a business/individual.					
16	H	System provides receipts as part of the payment process in real time.					
17	H	System allows authorized users to waive and void permitting and other fees and have all such changes reflected as part of the system audit trail.					
18	H	System tracks and accounts for all current and historical financial related transactions collected through the system.					

Attachment (B) – ERP Financial Transactions Requirements
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	A	B	C	D	E	F	
1		Financial Transactions Requirements					
2	Importance	Requirement	Fully Supportive/Included/Configurable x 10	Partially Supported x 6 (comments)	3 rd Party Product Snap-in x 2 (vendor and product name required)	Not Supported x 0	Description or Comments
19	H	Support for auditable financial tracking, including handling all Department cash transactions, escrow account management (for both people and buildings,) billing process management tools, and complete records for tracing and reconciliation tasks.					
20	H	Ability to accept Utility Billing payments from the community to allow a single payment interface, and pass payment information to the Utility Billing system as part of a integration.					
21		Setting up and Updating of Fees					
22	H	Ability to support all fees, fee tables, and fee information based on permit type, including effective and expire dates, shared fee variables, and unique fee variables where needed.					
23	H	Ability to add/remove/update fees.					
24	H	Ability to view fees and fee status for all related permits in a single view.					
25	L	Ability to associate fees with contract as well as permit.					
26	H	Ability to assign multiple budget codes to individual fees.					
27	H	Ability for fee to be modified, waived, cancelled or adjusted by staff user with auditing and annotation or explanation.					
28	H	Ability to track user, IP address, date and time, and before and after data for fee overrides.					
29	H	Ability to document and bill preliminary assistance fees prior to intake of a permit/case.					
30	H	Ability to set due dates on fees.					
31	H	Ability to issue new bill when fee changes occur.					
32	H	Ability to apply business rules to enforce when fee can be added.					
33	H	Ability to define labor hours associated with fees.					
34	M	Ability to associate labor hours against minimum fee amounts, and bill for additional labor hours beyond the minimum amounts.					
35	H	Ability for public to view and pay fees (standard and estimated) on-line or in-person.					

Attachment (B) – ERP Financial Transactions Requirements
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	A	B	C	D	E	F	
1		Financial Transactions Requirements					
2	Importance	Requirement	Fully Supportive/Included/Configurable x 10	Partially Supported x 6 (comments required)	3rd Party Product Snap-in x 2 (vendor and product name required)	Not Supported x 0	Description or Comments
36	H	Ability to recalculate fees based on the fee schedule in effect at the application or permit issue date.					
37	H	Ability to store revised fee schedules to be implemented in the future.					
38	H	Ability to create, track and manage applicant funding account, either pre-paid or line of credit.					
39	H	Ability for applicant to set up multiple customer funding accounts (e.g. escrow or advance deposits).					
40		Fee Payment and Refunds					
41	H	Ability to generate invoices.					
42	H	Ability to validate that full payments have been received before issuing permits.					
43	M	Ability to associate payments with a permit number.					
44	H	Ability for multiple permits to be paid for at one time, i.e., one payment could be paying for several types of permits.					
45	H	Ability to view transaction history (renewals, bills, payments, penalties, late fees, etc.) associated with a business/individual.					
46	H	Ability to validate plan and permit number before assigning payment.					
47	H	Ability to maintain full audit trail (user name, date, prior amount, subsequent amount, ect.) for all financial actions (current and historical) including modifications to financial transactions (e.g. waiving a fee).					
48	H	Ability to reverse a transaction and all related allocations and to record this action in the audit trail.					
49	H	Ability to show a credit balance.					
50	H	Capability to have notes linked to transactions.					
51	H	Ability to apply, track and report on payments for future projected charges (like a deposit or retainer).					
52	H	Ability to provide real time payment verification.					
53	H	Ability to provide automated warnings and/or holds based on NSF checks or delinquents accounts.					

Attachment (B) – ERP Financial Transactions Requirements

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1		Financial Transactions Requirements Requirement					
2	Importance		Fully Supportive/Included/Configurable x 10	Partially Supported x 6 (comments required)	3 rd Party Product Snap-in x 2 (vendor and product name required)	Not Supported x 0	Description or Comments
54	H	Ability to track delinquent or unpaid fees.					
55	H	Ability to have detailed payment receipt with line items based on payment/invoice number at the time when the transaction was completed. The line items to include fees paid, amounts paid, fee balances, date, time, and name).					
56	H	Ability to search by transaction number, address, fee type.					
57	H	Ability to e-mail fee payment receipt.					
58	H	Ability to provide printed receipts as part of the payment process in real time.					
59	H	Ability for the customer to be able to view their receipt on-line.					
60	H	Manages Trust Accounts whereby large payments are received in advance by Contractors from which funds are drawn to credit fees due.					
61	H	Manages all transactions involving bonds and bond refunds and relates them to permits and other types of applications.					
62	H	Ability to send alerts or trigger actions based on payment of fees.					
63	H	Ability to track the balances owed between departments.					
64	L	Ability to transfer fees collected electronically between departments in a timely manner.					
65	H	Ability to include credit balance in the calculation of total amount due.					
66	H	Ability to customize status and type codes for payments and refunds.					
67		Fee Calculations					
68	H	Tracks and automatically calculates all fees related to the permitting, planning, zoning, licensing and enforcement processes at any point dictated by the business rules.					
69	H	Ability to calculate estimated fees for projects based on permit and scope of work.					
70	H	Ability to calculate estimated fees based on user-defined variables.					
71	H	Ability to calculate fees by any combination of variables including mapping criteria, per item, sq ft of structure, volume of material, labor hours, construction use, construction type, occupancy type, reviews required, etc.					
72	H	Ability to dynamically change calculation methods for a fee based on permit data or workflows.					
73	H	Ability to capture hourly charges of time accrued based on time frame.					

Attachment (B) – ERP Financial Transactions Requirements

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1		Financial Transactions Requirements Requirement				
2	Importance		Fully Supportive/Included/Configurable x 10	Partially Supported x 6 (comments required)	3 rd Party Product Snap-in x 2 (vendor and product name required)	Not Supported x 0
74	H	Ability to calculate fines and interest.				
75		Clock				
76	H	Ability to calculate review timelines from intake to issuance, differentiating between periods of time for which the city and the applicant are responsible.				
77	H	Ability to generate reports(s), including:				
78		Total number of complete applications.				
79		Total number of applications with final decision notice issued within a timeline.				
80		Total number of applications for which an extension of time was mutually agreed upon by the applicant and the government.				
81		Variance of actual performance to deadline, excluding applications for which mutually agreed time extensions have occurred.				
82		Mean processing time and the standard deviation from the mean.				
83	M	Ability to manage the clock (i.e. track performance against standards) against a hierarchy of associated reviews rather than just an individual review.				
84	M	Ability to track against difference time targets base on type of permit and/or review.				
85	M	Ability to track against multiple simultaneous time targets for the same type of permit and/or review.				
86	M	Ability to restart the review stage without resetting the clock.				
87	M	Ability to identify permit types that are exempt from the timeline.				
88		Time Tracking				
89	M	Ability to associate employee time tracking codes with budget codes in the financial system for billing and payroll distribution purposes.				
90	M	Ability to define activity-based tracking codes by work group.				
91	H	Ability to validate data integrity when entering time (e.g. project number)				
92	H	Ability to enter and track time worked on any review or inspection activity by any user and automatically generate a fee.				
93	H	Ability to provide status to reviewers of how much time they have spent on a review and how much time remaining.				

Attachment (B) – ERP Financial Transactions Requirements

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1		Financial Transactions Requirements Requirement				
2	Importance		Fully Supportive/Included/Configurable x 10	Partially Supported x 6 (comments required)	3 rd Party Product Snap-in x 2 (vendor and product name required)	Not Supported x 0
94		Billing				
95	H	Ability for user to review calculated fees and make adjustments prior to final billing.				
96	H	Ability to bill customer for combination of standard fees and calculated fees.				
97	H	Ability to define language to be associated with each charge (so that it is understandable to the applicant).				
98	M	Ability to view entire history fee assessment, payment, corrections and current balance in one place.				
99	H	Ability to track the following items for billing purposes and performance distribution:				
100		Labor costs and hours				
101		Equipment/vehicle costs and hours				
102		Materials usage				
103		Contract/sublet/outside consultancy costs				
104		Miscellaneous costs				
105		Usage and fees for performance				
106		Distribution				
107	M	Ability to track reimbursable hours.				
108	H	Ability to enter invoices from outside organizations and to send them out to applicants (e.g. for peer review).				
109	H	Ability to set distinct rate structures for different billing scenarios on a given project, permit or code compliance case (e.g., external billing could contain appropriate overhead or markups while internal billing could be accomplished at direct cost).				
110	H	Ability to associate "roll-up" budget or accounting codes to groups of projects, permits, code compliance cases, work orders, and service requests for total accounting of projects.				
111	H	Ability to generate and track billing invoices for permits, periodic monitoring and inspections, and applicant funding accounts.				

Attachment A: RFI Financial Management Software – OTECH Review/Notes/Comments

Item#	Technical Section	Question/Comment/Notes
4 (H)	General	Requirement states the “Ability to view converted and migrated historical information...” – <i>is software vendor expected to migrate data from native system to the new system or to convert the data to a read-only reference for the new system? If software will query native system in real-time, does that mean that we still need to support the native AS400 system (i.e. hardware/software support)?</i>
5 (H)	General	VPN may be necessary for support to manage/maintain the system from outside the GGWAN.
6 (M)	General	Considering the initiative to move to Office 365, does this item need to specifically state the need to integrate or leverage Office 365?
8 (M)	General	Cloud/SaaS (items 62-77) are marked as N/A. Are any cloud options required?
9 (M)	General	Software Development Kit is an SDK, not SKD
14 (L)	General	Ability to export records to another system should be H priority.
16 (M)	General	Records should not be removed from the system, they should be deactivated and purged in compliance with retention and data integrity standards. See item 30.
43 (N/A)	Security (on-site)	Vulnerability Scanning should be a high priority. An IRS audit recommendations is to implement a vulnerability scanning tool.
44 (N/A)	Security (on-site)	Patching of system OS should be a high priority. If a patch is installed and the program breaks, we should have support to address the issues. We need to also consider OS upgrades for EOS.
50 (H)	GovGuam Hosted	What are the specifications for an on premise deployment? How many servers are needed? RAM? CPU? Disk Space?
51 (H)	GovGuam Hosted	Who will support this setup? Will any hardware be purchased with this type of support? Will vendor provide a turnkey solution including hardware purchase and support?
52 (H)	GovGuam Hosted	Will test environments require additional servers? Or will it be a separate module in existing server(s)?
53 (H)	GovGuam Hosted	OS should be upgraded to support Windows Server 2016 or 2019 (datacenter – if it is a VM) – who will purchase OS license?
54 (H)	GovGuam Hosted	SQL server version should be upgraded to support SQL 2014 or higher – who will purchase SQL license?
57 (H)	GovGuam Hosted	Who will cover the cost of hardened virtual image support?
58 (J)	GovGuam Hosted	Requirement identifies the cloud backup and recovery software as Evault – we do not have Evault in our environment. Will this backup solution be purchased with this software solution?
61-77 (N/A)	Cloud/SaaS	The entire section Cloud/SaaS is N/A. Remove these items.