

Mississippi State University

RFP 22-103 Contract Lifecycle Management System

Questions and Answers

1. Do you have estimates for the following user types that might need access to this software?
Contract managers =
Contract approvers =
Contract submitters, requesters, viewers =
Vendors/external =

Response: see section 14d, 14e and 14 f. This is the best estimate we have at this time.

2. Are you willing to consider digital submissions instead of hardcopy mailings?

Response: We do not currently have a method of accepting and securing proposals made by digital submission. We will need the submittal to comply with section 8 of the RFP.

3. Would you be open to pricing for the Contract Management to be hosted by vendor (SaaS/cloud) or deployed on your organization's server (on-premise)?

Response: Yes, See RFP section 3 (e) (i)

4. How many total users?
How many internal users will require administrative level access?
How many internal users will require the ability to add, edit and delete?
How many internal users will require request only access?
How many internal users will require read-only access?

Response: See question 1 above

5. How many internal users do you project will require access to the system at any given time?

Response: See question 1 above

6. Does your organization require data import services? If so, please expand upon the data migration / importing requirements for the Contract Management Software? (Such as record info, employee lists, vendor lists, etc.)

Response: Yes, we require data import services

7. How many total electronic files (PDF, MS Word, etc) in current/legacy system into the Contract Management Software?

8. How many total electronic files in current/legacy system? (rows in the exported spreadsheet)

Response: 19,400

9. Where are the legacy (historic) electronic contract files currently stored? (shared folders, Sharepoint, document management system, paper, etc)

Response: Contract Assistant Enterprise (CAE), Shared Network Folder

10. Can you please expand upon your preferences to integrate with Banner and specified ERP systems? Please provide system details (system name and version, database used, scope of use, home-grown or commercial) if applicable.

Response: Banner 9x, Oracle, Campus Wide, Commercial – nightly flat files

11. Are there any additional systems that may require a one-time data import such as a legacy Contract Management system? If so, please provide the system name, version, scope of use, the total number of contract records and files being imported into the system and SOAP/REST API, if available.

Response: No

12. What objects, fields, and tables will your organization be passing in the data integration between the Contract Management Solution and with Banner and specified ERP systems?

Response: Currently none

13. Are the other systems installed/deployed on your organization's server(s) or is the vendor hosting the software (cloud/SaaS)

Response: Currently on prem

14. Does Banner and specified ERP systems have one of the following available for integration and your organization has licensed access: SOAP API, REST API?

Response: ETHOS – currently not available

15. Can you please provide additional details about your organization's process flows or diagrams as it relates to the integration requirements?

Response: We currently do not integrate with Banner

16. What documents/contract types would you like to author within the system (number of templates)?

Response: We look forward to the Contractor providing insight in this area. We currently have the following standard documents: Standard Contract, Simple Form Contract, Honorarium, Reimbursement Agreement, Research Experience Stipend Form, Standard Contract where MSU

provides a service, Standard Lease agreement. Depending upon the capabilities of the proposed product, we may have more or less.

17. Do you require professional services to configure templates? If so, how many would be required for the awarded vendor to configure?

Response: Having no knowledge of the proposed product we are unable to answer this question. Proposer should have enough knowledge of their product and other University implementations to be able to provide guidance in this area. Presumably, if the configuration of templates is fairly simple, MSU employees could do this. If the configuration of templates is complex, MSU would probably need professional services.

18. Do you require professional services to configure workflow processes? If so, how many would be required for the awarded vendor to configure?

Response: Having no knowledge of the proposed product we are unable to answer this question. Proposer should have enough knowledge of their product and other University implementations to be able to provide guidance in this area. Presumably, if the configuration of workflows is fairly simple, MSU employees could do this. If the configuration of workflows is complex, MSU would probably need professional services.

19. Can you please provide additional details about your organization's workflow/approval processes? Can you please provide number of steps and examples?

20. Response: See Appendix B of RFP

21. Do you have an established time frame for the implementation of the awarded solution? If so, what are the anticipated kick-off and go-live dates? If no specific dates have been established, how many weeks do you plan to dedicate to the implementation process?

Response: See Section 5 (b) of RFP

22. Does your organization require a full-time dedicated Project Manager for this implementation? Typically, implementations do not require a full-time dedicated project management resource for the project duration, but rather project management/coordination services hours (remote) can be included with the proposal to support the implementation project management. If a full-time dedicated project management resource is a requirement for this project, are these services expected to be provided online/remote or onsite?

Response: MSU requires adequate staffing to insure a successful implementation. Having no knowledge of the proposed product we are unable to answer this question. Proposer should have enough knowledge of their product and other University implementations to be able to provide guidance in this area.

23. Is your organization eligible to purchase off the GSA Schedule 70? If yes, would you like GSA pricing in the bid response or retail pricing?

Response: State law does not give us the authority to purchase from GSA contracts. We seek the best pricing available.

24. If in the event our response is subject to an Open Records Request, will we be notified and given the opportunity to provide a redacted response in accordance with applicable Freedom of Information laws?

Response: Yes

25. Does the awarded vendors staff have to be e-verified, run through OFAC sanction lists, and meet US working regulations?

Response: No

26. Does your organization require digital signature option vs an electronic signature option?
Digital signature solutions leverage certificate-based digital identification for validation of document integrity as opposed to the more common electronic signatures. Digital signature requires additional validation services and are priced higher.

Response: Adobe Sign is our digital signature platform.

27. Does your organization require an electronic signature tool?

Response: Yes

28. If so, are you currently utilizing a specific product and which tool are you using?

Response: Adobe E-signature

29. Does your organization require a testing/staging environment in addition to the live/purchased system?

Response: We have found implementation of systems appear to flow smoother if there is a testing environment. Having no knowledge of the proposed product we are unable to answer this question. Proposer should have enough knowledge of their product and other University implementations to be able to provide guidance in this area.

30. How many contracts to be migrated?

Response: We currently have approximately 2600 active contracts. This figure changes daily. We would assume that most, if not all would be migrated depending upon costs and ease. Having no knowledge of the proposed product we are unable to answer this question. Proposer should have enough knowledge of their product and other University implementations to be able to provide guidance in this area.

31. Can the RFP responses be submitted electronically?

Response: See question 2

32. Is there a requirement to provide full answers for each section, or as part of the initial review would stating that we are "compliant" with the required functionality be enough for some responses and we can follow up with further details as required?

Response: We would like detailed responses as we expect to determine from the initial submissions which proposals are deemed capable of meeting our needs.

33. XXVI-Allows for integration with Banner to monitor payments and revenue received and provides indicator prior to making payments which exceed the contractual amount - Is this required as part of the initial implementation. Most customers would complete this as part of a Phase II, but we want to check?

Response: We would like this capability with the initial implementation but will consider all proposals. Having no knowledge of the proposed product we are unable to answer this question. Proposer should have enough knowledge of their product and other University implementations to be able to provide guidance in this area.

34. Are there any other systems outside of Banner that are a requirement as part of the initial phase of the Transformation?

Response: No

35. What percentage of contracts are on 3rd party paper?

Response: We do not have data on this. A rough estimate would be 25% to 35%.

36. PCI Compliance issues - Can you provide further detail on this please

Response: This is standard language in all of our RFPs. PCI Compliance relates to payment via credit cards. If the proposal does not include any type or credit card transactions, the section would not be applicable. In order to accept credit and debit card payments, Mississippi State University must maintain compliance with Payment Card Industry Data Security Standards (PCI DSS). The DSS were created to protect cardholder data to reduce fraud and identity theft. Effective PCI Compliance programs involve many different elements including IT security, network security, policies and procedures and training and awareness programs. For more information about PCI compliance standards, please visit the [PCI Security Standards Council web site](#)

37. Are there any measurable metrics that are available today such as contracting cycle time, contract risk / non-compliance etc.? If so, please share the latest reporting.

Response: We do not have any documented metrics. If there are no issues, Contracts under \$25,000 are typically turned around within 24 hours. Contracts between \$25,000 and \$250,000 are typically turned around within 3-4 days. Contracts which require negotiations take longer and the time period is often dependent upon the Contractor's response.

38. 24 contract types are identified in Appendix C; how many contract templates per contract type do you have?

Response: We do not have templates for all file types. Proposer should have enough knowledge of their product and other University implementations to be able to provide guidance in this area.

39. Are you able to share sample contract template based on complexity (low, medium, high)?

Response: Some of our Contracts are available at <https://www.procurement.msstate.edu/contracts/index.php>

40. In addition to user training, do you need help supporting change management activities? If yes, what type of activities will you need assistance with?

Response: Based on the proposers prior experience implementing the product at similar institutions, we would anticipate the proposal to provide guidance on the need for and extent of change management required.

41. Do you need assistance around standardizing your contract workflow processes including approvals processes?

Response: Based on the proposers prior experience implementing the product at similar institutions, we would anticipate the proposal to provide guidance on the need for and extent of workflow assistance required.

42. Where are existing contract documents stored? Please specify the different contract repositories/databases/systems used to store legacy contracts.

Response: Local network drive folder

43. What is the expected retention period for contracts?

Response: 3 years from contract close out

44. What are the approximate number of meta data fields/ contractual information points (like counterparty name, start date, end date etc.) that need to be migrated into the new system of choice? Please provide a list, if available.

Response: We do not have this information available at this time

45. Have you identified a list of data points that need to be integrated, that need to flow to and/ or from the CLM system? Is yes, could that list/ average number per template/department please be shared with us?

Response: Not yet identified

46. Are there any legal or regulatory restrictions that impact your institution and may need to be considered during your implementation?

Response: No

47. Are you interested in any OCR feature with a CLM application?

Response: Undecided

48. Are you open to offshore resources (non-US) working on the CLM implementation?

Response: All contracts must be secured within the US. We could consult with someone outside of the US regarding the implementation though.

49. Do you have a preference on eSignature provider?

Response: Adobe Sign

50. Please specify the ERP system that requires integration with the CLM system?

Response: Ellucian/Banner

51. How many users will need to be trained to be system administrators?

Response: See Question 1

52. Allows for electronic signatures – Does MSU use a provider currently to execute eSignatures (ex. DocuSign/AdobeSign, etc.)?

Response: Adobe Sign

53. How many departments does MSU want this CLM solution to roll out to?

Response: Approximately 120 departments

54. How many of these departments (if any) will have unique business rules, templates, approvals which are not centralized? Please provide detailed list of breakdown (if applicable) If multi-departmental, does MSU require any data partitioning?

Response: Each department typically has different approval flows. It is our hope that we can standardize as much as possible. We are hoping the contractor can provide adequate guidance to allow us to meet the various departmental needs while being as effective and efficient as possible.

55. Can MSU provide a count for number of clauses and templates expecting to be uploaded and created in the new library(ies)?

Response: Proposer should have enough knowledge of their product and other University implementations to be able to provide guidance in this area.

56. User Counts:

How many total users does MSU need full access for?

How many users does MSU need for “read-only” access?

How many users does MSU need for approvals alone?

Response: See question 1

57. Does MSU require a single tenant environment for this contracting system?

Response: ITS recommends a single tenant environment.

58. Ability to integrate and allow for bi-directional data exchange with the ERP system is desired – Can MSU provide the data/detail needing to be integrated to and from the CLMS and ERP?

Response: It is desired. Details will be provided when needed.