

GLC Contract Management Software – Questions and Answers (additional page)

1. How many total users will need access to the CLM? Est.(45) Forty-five. (MI = May increase)
 - a. How many internal users will require administrative level access? (5) Five (MI)
 - b. How many internal users will require the ability to add, edit and delete? (5) Five
 - c. How many internal users will require request only access? (14) Fourteen (MI)
 - d. How many internal users will require read-only access? (23) Twenty-three (MI)
2. How many internal users do your project will require access to the system at any given time? Est.(45) Forty-four (MI).

Data Import

3. Does your organization require data import services? **Yes**.
4. If so, please expand upon the data migration /importing requirements for the Contract Lifecycle Management Software? (Such as record info, employee lists, vendor lists, etc.) **See the attached "GLC Contract Management Software – Questions and Answers" (additional page).**
5. How many total electronic files (PDF, MS Word, etc.) in current/legacy system into the Contract Lifecycle Management Software?
 - a. How many total electronic files are in current/legacy system? (rows in the exported spreadsheet) **63,450**
 - b. Where is the legacy (historic) electronic contract files currently stored? (shared folders, SharePoint, document management system, paper, etc.) **{1}. Electronic Data is stored in an Access database and Excel SS. (2). Contract documents are saved on a network drive, and within Sharefile repository application.**

Data Integration

6. Can you please expand upon your preferences to integrate with **MS Dynamics 365** Business Central? Please provide system details (system name and version, database used, scope of use, home-grown or commercial) if applicable.

A: System Name (NA), Version 24. Scope of use: GLC ERP. Commercial use.

The GLC would like to explore the capability of the CLM application working with our customized MS Dynamics 365 BC Vendor database module,(GLC's vendor data source). Contacts created in MS D365 BC will sync to the CLM. The vendors updates would also be synced with CLM application.

7. Are there any additional systems that may require a one-time data import such as a legacy Contract Lifecycle Management Software? **No**
 - a. 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.
8. What objects, fields, and tables will your organization be passing in the data integration between the Contract Lifecycle Management Software and MS Dynamics 365? **TBD**
10. Are the other systems installed/deployed on your organization's server(s) or is the vendor hosting the software (cloud/SaaS)? **Hosting software on cloud/SaaS (SQL)**
11. Does MS Dynamics 365 have one of the following available for integration and your organization has licensed access: SOAP API, REST API? **TBA**
12. Can you please provide additional details about your organization's process flows or diagrams as it relates to the integration requirements? **See the attached "GLC Contract Management Software – Questions and Answers" (additional page).**

Document Templates

13. What documents/contract types would you like to author within the system (number of templates)? **Up to (5) Five**
 - a. Do you require professional services to configure templates? **Yes**
 - b. If so, how many would be required for the awarded vendor to configure? **Up to (5) Five**

Workflow

14. Do you require professional services to configure workflow processes? **Yes**
 - a. If so, how many would be required for the awarded vendor to configure? **Yes**
15. Can you please provide additional details about your organization's workflow/approval processes?
 - b. Can you please provide number of steps and examples? **See the attached "GLC Contract Management Software – Questions and Answers" (additional page).**

Implementation

16. Do you have an established time frame for the implementation of the awarded solution? (45 Days from Purchase)
 - c. If so, what are the anticipated kick-off and go-live dates? **TBA**
 - d. If no specific dates have been established, how many weeks do you plan to dedicate to the implementation process? **3-4 weeks / 21 -28 days**

Public Sector Bids

17. Is your organization eligible to purchase off the GSA Schedule 70? **Yes**
 - e. If yes, would you like GSA pricing in the bid response or retail pricing? **Yes**
18. 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? **Yes**

Additional Questions

19. Does your organization require an electronic signature tool? **Yes**
 - f. If so, are you currently utilizing a specific product and which tool are you using? **Sharefile (formerly RightSignature), and Adobe sign.**
20. Does your organization require a test environment/sandbox? **Yes**

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Data Import # 4

- Data migration /importing requirements for the Contract Lifecycle Management Software? (Such as record info, employee lists, vendor lists, etc.)
Requirements Include:
- Import all electronic vendor list file data from the current MS D365 BC vendor list into CLM.
- Import all electronic file contract data rows from the current Access database and Excel SS into CLM.
- Transfer all contract documents from the Sharefile application folder, local folders, and network drives into CLM.
- All Word documents should be converted to PDFs.
- Create employee lists for use in CLM.

Workflow Process

1. Contractor is required to complete the GLC onboarding process by completing compliance documents and returning them to the Purchasing Dept.
2. A Vendor ID is created in D365 BC and is issued internally to GLC stakeholders
3. The GLC sends the contractor a copy of our standard contract
or
4. The contractor submits their contract to the GLC; stakeholders are notified
5. The incoming contract is queued for the Contracts Administrator “CA” (1) review, and, upon successful review (2) enter the contract data into the DB, the contract document will be forwarded to the staff attorney for review.
6. The staff attorney reviews and approves, and the contract is forwarded back to the Contracts Administrator.
 - a. If denied, the contract will begin the red/black lining process until the contract is successfully negotiated or canceled. This task is delegated and tracked to another attorney if needed.
7. CA drafts the contract routing coversheet (electronic template) and attaches the approved contract. The CA routes for signature by the contract’s stakeholders.
8. Each signatory will sign in sequence one after another.
9. Signed coversheet, contract, and signature receipts/documentation will be saved

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10. The signed contract will be emailed to the contractor for counter-execution, or a copy of the executed contract is sent to the contractor with additional GLC attachments.

Approval Process Contract Routing Form (CRF) and Contracts:

- Contracts for marketing and technology initiatives services/goods must be reviewed and approved by Chief Technology Officer and Information Security Director.
- Contracts valued at \$5,000 and less must be approved by the Dept. VP.
- Contracts valued at \$5,000 and above must be approved by the Dept. SVP.
- All contracts must be reviewed and approved by the VP and or SVP of Finance, the VP of Legal, and the CEO or designee.
- Purchasing Department assigns the contract number and approves the CRF only.
- Only the General Counsel, CEO or designer can enter the GLC into contracts.
- Only managers, Directors, VP's and SVP's can be listed as contract mangers on the CRF.