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ICA/SIO Presentation RFI to Vendors RAMP/ARM Evaluation Process and Status -05 June 1995 Slide presentation by Working Group UN-SEC, UNICEF, UNDP, UNOPS, Funtional Requirements & Alternative approaches [PDF version of handouts/ slides]

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Records & Archive Management Unit =80669443
Adhiratha Keefe (Records Management Officer)
Adhiratha Keefe (Records Management Officer)

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WU_Staff: Adhiratha KKeefeRAM Officer
Correspondent: Ariel Lifshitz UNDP
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Print Name of Person Submit Images Signature of Person Submit Number of images without cover

A. Keefe [Signature] 16
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2 pages

RAMP/ARM Request for Information [RFI]; Evaluation Process and Status;	RAM/95-114/R02
<i>Presentation to ICA/SIO meeting 5 June 1995</i>	OVERVIEW

[Slide I]

1. **The Initiative & Informal Work Group:
UN/UNICEF/UNDP/OPS**
2. **Approaches for migration from systems in use**
3. **Criteria for functional requirements**
4. **Request for Information [RFI] sent to 25 +,
nine detailed Responses, Follow-up, Evaluation**
5. **Five Software Vendors selected for further
consideration**
6. **Next Steps: Work group & You**
7. **Next Steps: individual organizations
UN/UNICEF/UNDP/OPS/Other**
8. **Attachments Available: Annex 1 - Annex 10**

1. The Initiative & Informal Work Group:

UN/UNICEF/UNDP/OPS

- a. Why need work group, realization of:
 - i) similar problems (was Trigger)
 - ii) limited resources (time , skill & other)
 - iii) need for intellectual & other support

- b. Scope of Project
 - i) Support traditional records and archive management (mostly paper)
 - ii) Work with Electronic records [ERM], Documents, [EDM], Messages [EMail] and Images
 - iii) Integrate well with other UN Community Applications

- c. Working methods of group:
 - i) Adhoc discussions, note common goals
 - ii) Invite all interested, Schedule as majority available
 - iii) Send brief notes of decisions
 - iv) Keep open ended + have targets for products

2. Approaches for migration from systems in use:
 - a. off shelf package (+ enhancements/next upgrade)
 - b. Conversion (+ enhancements)
[at least for data conversion]
 - c. Design in new platform or tool
[Technical and integration Aspects]

3. Criteria for functional requirements:
 - a. Now in UNICEF RAMP + planned enhancements
 - b. UN ARMS functional requirements list
 - c. UN Rec Manage p+c package, ARMA specs and colleagues comments on early draft

4. Request for Information [RFI], Response & Evaluation

- a. COVER Request for Information RFI
(RAM/94-311) ANNEX 1
- b. List of Functional Requirements & Priority System for each Funct Req. item:
(RAM/93-248/RO4) ANNEX 2
(RAM/95-112/RO2) ANNEX 3
- c. Vendor Response options for each RFI item:
(RAM/95-128/RO2) ANNEX 4
- d. Tracking/Recording Mechanism
(RAM/94-322) ANNEX 10
- e. Follow up Technical Questions
(Ram/95-111), ANNEX 5
- f. Responses to Technical follow-up
(RAM/95-113) ANNEX 6

4. Request for Information [RFI], Response & Evaluation

a. COVER Request for Information RFI

- i) Sent to 25 + vendors *RAM/94-311 = ANX 1*
- ii) Explain Work group, process and Goal
- ii) Request immediate Fax acknowledgement & date of detail response to follow

b. List of Functional Requirements & Priority System for each Funct Req. item:

- H+ = Highest = 12 pts *RAM/93-248/R04 = ANX 2*
- H = High = 10 pts
- M = Medium = 06 pts *RAM/95-112/R02 = ANX 3*
- L = Low = 02 pts

c. Vendor Response options for each RFI item:

- A = 10 pts = Function Now available *(RAM/95-128/R02 = ANX 4)*
- B = 07 pts = In Beta version can show now
- C = 03 pts = Considering Long Term (6 mo to Year)
- D = 02 pts = Would Develop for price (generic for future)
- E = 01 pts = Not plan to implement (maybe interface)

4. RFI Response & Evaluation [continued]

d. Tracking/Recording Mechanism

i) of 25 Vendors contacted, 9 provided detailed response

ii) some required follow-up calls

RAM/94-305/RO1
= ANX 10

e. Follow up Technical Questions

(Ram/95-111),

i) Technical platform (database, LAN, GUI, Scale)

ii) Integration (text, image, Email, fax)

iii) Other (consistency across media)

f. Responses to Technical follow-up

i) Table comparison (Ram/95-113)

ii) Highlighting areas of technical concern

iii) 5 vendors for further consideration

5. Five Software Vendors selected for further consideration

<i>Vendor</i>	<i>Contact</i>	<i>Product</i>	<i>Comments</i>
ITM Intermation		Audience Backstage	
PSS Public Service Sector		RIMS DIMS	
TOW Tower		TRIM	
FPS Provenance Systems		ForeMost	
IN Information Network		InSight	
Other			

6. Next Steps for Work Group
(possibly with consultant)
 - a. Review Demos for 5 short listed Vendors
 - b. Obtain additional clarifications from vendors
 - c. Do cost analysis
 - d. Make recommendation(s):
 - e. Organizations interpret recommendation

6. Next Steps for Work Group (possibly with consultant)

- a. Review Demos for 5 short listed Vendors
 - i) View presentation at ICA/SIO
 - ii) Note Comments/questions from ICA/SIO
 - iii) Solicit comments from others (e.g. TF/DOM)
 - iii) Develop Detailed Test Script

- b. Obtain additional clarifications from vendors
 - i) Check references
 - ii) Make site visits
 - iii) Run detailed test script,
 - record results
 - Note what can not be tested
 - iv) Note enhancements needed

- c. Do cost analysis
 - i) Note Start up & maintenance
 - i) one user, multi user,
 - ii) Site license, multi site license
 - iv) Develop strategy to limit perceived risks

6. Next Steps for Work Group (Continued)

- d. Make recommendation(s):
 - i) Note "Best balanced Choice"
 - ii) Record reasons for the decision
 - iii) Note what not covered by decision
 - iv) Note when the decision should be revisited
 - v) Inform all those responsible for related applications

- e. Organizations interpret recommendation based on:
 - i) long-term and short term goals
 - ii) Platform being used by other applications
 - iii) budget & other support available
 - iv) Other

7. Next Steps for Individual organizations

a. UN

i) Work Group + consultant

ii) Immediate for Archives Unit

- Use Selected package in Archives
- Recommend to other offices/Agencies for archives [long term records]

iii) Immediate for Rec Management Unit

- Use selected package in RM Unit
- Advise other offices for Active records

iii) Long term

7. Next Steps for Individual Organizations (Continued)

b. UNICEF

i) Compare:

- recommended package (s),
- Migration + enhancement (2 year decision),
- Build RAMP model as part of new systems

ii) For Headquarters

- Agree two year and 5-7 year strategy
- implement before end 1995

iii) For Field Locations

- Agree two year and 5-7 year strategy
- Test Recommended package with field office
- Review overall strategy in two years

iv) Update documentation

- all training material/help screens
- related instructions/policy/procedure

7. Next Steps for Individual Organizations (Continued)

c) UNDP:

i) Preliminary exercise for IPM (Integrated Programme Manager) Module:

- Document Management &
- Institutional Knowledge

ii) Revise the UNDP file Classification

iii) Use work group research

- Decide best software package(s)
- Make recommendation to HQ user divisions
- Make recommendations to field offices

iii) Interagency work group process has been a valuable input

D- Useful for selection process that will take
place in the context of IPM.

d) Others

i) UN/OPS
- Revised File codes

ii) Others

iii) You

8. Attachments Available at meeting & by Email request (akeefe@unicef.org)

Annex	Document Reference	Content/Subject	number pages
1	RAM/94-311	Intro to RFI package sent to vendor [including cover sheet and sample Acknowledgement forms]	9 wp
2	RAM/93-248/ R04	Detailed Functional Requirements [first 4 pages includes legend and vendor priority code for responses]	4 wp
3	RAM/95-112/ R02	RFI Para [A-F] sorted by funct req. para item number [with full title and subject content of each item] - Quattro pro spreadsheet]	12 QP
4	RAM/95-128/ R02	RFI Sort by priority and weight of items for Para A-F , Table of Responses from vendors [W/P:H+=12, H=10, M=6, L=2 Quattro pro Spreadsheet]	7 QP
5	RAM/95-111	Follow up technical Questions sent to vendors: platform, Integration, other	3 WP
6	RAM/95-113/ R02	(Spread sheet of vendor responses to follow up technical requirements questions)	3 QP

9. Additional Attachments Available

by email request akeefe@unicef.org:

Annex	Document Reference	Content/Subject	number of pages
7.	RAM/94-148/ R06	Vocabulary Control/Thesaurus: issues and use [Informal workshop and idea sharing sessions at UNICEF]	7 wp
8.	UN/ARM/95-	UN Archives functional requirements: an introduction [work in progress]	
9	RAM/94-305/ R01	RFI Para [G-J] sorted by funct req. para item number [with full title and subject content of each item] -Sent to Vendors with initial packet it included questions on database functionality, architecture, costs and vendor reliability]	10 WP
10	RAM94-322/ R02	Contact, Tracking and Status Log for Vendor Response to RFI [Reference to file, by vendor includes Address etc.]	7 wp
11	RAM/93-190 + Ram/93-145 Ram/93-177 Ram/93-146 Ram/93-149	Introduction to Appraisal Guidelines Workshop papers [from 1993 ICA/SIO includes Table of Contents, reference to previous studies and Appraisal Criteria Grid cover sheet]	6 wp