Electronic Records Management (ERM) Vendor Demo Process
REVISED June 2019

This notice is an update to the GSA Integrated Workplace Acquisition Center (IWAC) Interact post on September 26, 2018 regarding the ERM demos. The initial proposal included two options for vendors related to the recording of their demo videos, one of which offered the services of GSA to record vendor presentations. After careful consideration, we have determined that we will be unable to provide this service to our vendors. As a result, vendors interested in participating in the demo process will be required to record their own presentations. Once presentations are recorded, vendors will provide GSA with a link to their demo(s). The provided link will be posted on GSA's Discovery tool. The Discovery tool is a market research site that helps customers explore GSA services contracts, vendors, and vendor contract history to determine whether a GSA contract can meet their needs. Here is a link to the Discovery tool for your reference: https://discovery.gsa.gov/

The Discovery tool is in the process of being updated, and we expect all existing ERM vendor contract information to be loaded to this site in the coming months. We will notify all existing contract holders once that process is complete. In the meantime, vendors can start submitting a link to their demo by emailing it to RecordsManagement@gsa.gov. Once a vendor's demo is approved in accordance with the guidelines below and the contract details have been loaded to the Discovery tool, GSA will add a link to the vendor's contract data page so that customer agencies can begin viewing the demo for market research purposes. We recommend that vendors start preparing their demos at their earliest convenience.

We are asking vendors to create demos for the following three scenarios from NARA's Use Cases for Electronic Messages:

- ERM.010.L1.02. Determine if the electronic message can be placed under records management control
- ERM.020.L1.02. Manage the metadata of an electronic message record throughout the lifecycle
- ERM.030.L1.02. Dispose of approved electronic message records

Fore more information about the use cases, please see Records Express and the Federal Electronic Records Modernization Initiative (FERMI) website.

Guidelines and Considerations for Demos

Technical

- Demo for each scenario should be no more than 5 minutes with an up to 5 minute introduction (max 20 minutes) - The vendor may choose to allocate more or less time to

each scenario, as long as the overall 20 minutes allotted is not exceeded. (Videos shorter than 20 minutes are acceptable and strongly encouraged. Due to the number of contract holders and their respective use cases/demos, shorter videos will reduce the amount of time required to conduct market research)

● We strongly encourage Section 508 compliance for all vendor demos to ensure that all customer representatives have access to this content. For more information, please visit: https://www.section508.gov/

Content

● Include date at beginning of presentation.
● Consider addressing each type of electronic message in the demos, specifically email, SMS/MMS, and chat messages.
● Automation should be considered wherever possible. Agencies are looking for ways to reduce the number of steps end users need to take to manage their electronic messages. Describe where people (system administrators, records management staff, end users) are involved in managing electronic messages.
● Describe your general approach to records management: Traditional, Hosted, Embedded, and ERMaaS.
● Do not compare your product or service to that of a competitor or mention competitor names in your presentation.
● Do not mention Federal or commercial customers, or include visuals that would reveal information about any customer, during the presentation.

GSA/NARA Demo Submission, Review & Approval

Vendors may submit a link to a web page or video channel where the video demo(s) can be accessed" or a PDF file containing a link to the video demo(s), as soon as possible, to recordsmanagement@gsa.gov. The link (or PDF) provided should provide access to all updated or new video demos in the future. However, before any new demos are added to a vendor's site or channel, they should be submitted to recordsmanagement@gsa.gov for review; Once GSA/NARA approves the demo, notification will be provided that the demo can be added to the vendor's site/channel. Unauthorized vendor demos will result in the removal of the vendor's contract information on the Discovery tool.

In order to simplify the market research process for customers, vendors should limit the information contained in their link strictly to the demo videos and demo related information. Brief descriptions of the videos and identification of the applicable use cases are appropriate and recommended content.

Recorded demos will require review by GSA and NARA for content (appropriateness and style of delivery), technical aspects (audio/video quality), and to ensure that all guidelines and considerations contained in this document have been met. GSA reserves the right not to

release a recording that contains inappropriate content, does not follow the guidelines listed above, or is of poor audio/video quality.

While there are factors in the review process that are out of our control, GSA and NARA will review demos as quickly as possible to ensure customer access in a timely manner.

<u>Release of the Vendor Demo Videos:</u>
- Video on Demand (will allow viewers to consume on their schedule, as opposed to having to watch live).
- Hyperlinks to the Use Cases will be posted to GSA's Discovery Tool.
- Once videos are approved, there may be a waiting period for posting the videos on the Discovery tool. However, GSA reserves the right to post videos in the order they are received and/or based on the approval date. For this reason, we strongly suggest that vendors follow the guidelines and considerations posted in this document to avoid delays in posting your video.

Questions regarding the vendor demo process, should be emailed to recordsmanagement@gsa.gov.