

SELECTED PROCUREMENT INTELLIGENCE

Document Management Upgrade — eDOCS & InfoCenter Web

ISSUING AGENCY

County of Westchester, New York

SOLICITATION TYPE

RFQ — Request for Quote (Informal)

SOLICITATION NUMBER

RFQ-WC260459 | Ref #428074

SUBMISSION DEADLINE

June 29, 2026 at 2:00 PM EDT

ESTIMATED CONTRACT VALUE

~60 Professional Service Hours (10 PM + 50 Technical Assistance Hours)

LOCATION

White Plains, NY

Document Management Upgrade — eDOCS & InfoCenter Web

County of Westchester, New York · White Plains, NY

EXECUTIVE SUMMARY

The County of Westchester seeks qualified vendors to upgrade its existing NetDocuments eDOCS document content management system and implement InfoCenter Web across county infrastructure. The engagement covers a defined scope of professional services totalling an estimated 60 hours (10 Project Manager + 50 eDOCS Technical Consultant), with the County retaining responsibility for all server provisioning, networking, SQL environment setup, SSL certificates, and customer-side deployment. Award goes to the lowest responsive bidder who meets all NetDocuments authorization and experience requirements. This is an informal RFQ under the Empire State Purchasing Group — the County may exercise wide discretion including no-award if lower pricing is located through another channel.

SOLICITATION OVERVIEW

ISSUING ORGANIZATION	County of Westchester, Bureau of Purchase and Supplies
SOLICITATION NUMBER	RFQ-WC260459 Ref #428074
SOLICITATION TYPE	RFQ — Request for Quote (Informal) — Empire State Purchasing Group
PUBLISHED	June 17, 2026
QUOTE DUE	June 29, 2026 at 2:00 PM EDT
ESTIMATED SCOPE	60 professional service hours: 10 PM hours + 50 Technical Consultant hours
DELIVERY POINT	111 Dr. Martin Luther King Jr. Blvd., White Plains, NY 10601
CONTRACT NATURE	Professional Services — item-based pricing
SUBMISSION METHOD	Electronic submission via Empire State Purchasing Group portal
Q&A; METHOD	Online via portal (5 mandatory bid questions must be answered)
NAICS CODE	541519 — Other Computer Related Services
NIGP CODES	91829 (Computer Software Consulting); 92064 (System Implementation & Engineering)

SCOPE OF WORK

- Assess and document the current eDOCS environment and produce a written upgrade plan.
- Install and configure eDOCS DM application servers and all associated services.
- Upgrade one (1) eDOCS library from the current version to the target release.
- Install and configure InfoCenter Web, DM REST API, modern authentication via Azure Active Directory (SSO), Office add-ins, Microsoft Teams integration, OneDrive integration, and Email Linking/Graph API integration.
- Create and deploy test client images and generate client configuration scripts; provide deployment support for both.
- Execute functional testing, UAT support, production library refresh, production database upgrade, production indexing, and initial client onboarding support.

- County is responsible for: Windows servers, SQL server environment, file storage, SSL certificates, networking, backups/restores, and customer-side deployment activities (unless otherwise agreed in writing).

KEY TECHNICAL REQUIREMENTS

- Vendor MUST be an authorized NetDocuments eDOCS professional services provider — authorization proof required.
- Vendor MUST have demonstrated experience performing eDOCS upgrades and InfoCenter Web implementations.
- Provide project management, technical consulting, installation, configuration, and testing support.
- Must respond to all 5 mandatory bid questions in the portal — missing responses result in non-responsive determination.
- Pricing must be item-based (per the portal); taxes must NOT be included — County is tax-exempt.
- Delivery/start date must be stated (best or earliest possible).
- Payment terms: 2% 10 NET 30 standard; discounts for early payment must be stated.
- Pricing guarantee period must be stated.
- Warranty terms must be included.
- Electronic Funds Transfer (EFT/Vendor Direct) enrollment required for payment.

EVALUATION CRITERIA

CRITERIA	WEIGHT / SCORE	POINTS
Price — Lowest Responsive Bidder (Primary criterion)	100/100	100
NetDocuments Authorization & Demonstrated Experience	0/100	0
Response to 5 Mandatory Bid Questions	0/100	0
Delivery/Start Date Competitiveness	0/100	0

SUBMISSION SCHEDULE & METHOD

PUBLISHED	June 17, 2026
Q&A; METHOD	Online via portal (Empire State Purchasing Group)
QUOTE DUE	June 29, 2026 at 2:00 PM EDT
CONTRACT START	TBD upon award — vendor must state earliest possible start date
SUBMISSION METHOD	Electronic — via Empire State Purchasing Group portal
DELIVERY LOCATION	111 Dr. Martin Luther King Jr. Blvd., White Plains, NY 10601

RISK REGISTER

#	Risk	Mitigation
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1	No-award risk — County may locate lower pricing via Empire State Purchasing Group (Clause 17)	Research current Government pricing for eDOCS services; undercut by at least 10% where possible
2	NetDocuments authorization requirement — unqualified bidders will be rejected	Confirm prime holds or can demonstrate active NetDocuments eDOCS partner authorization before bidding
3	5 mandatory bid questions — missing or incomplete responses result in non-responsive determination	Review all 5 questions with prime before submission; draft complete answers in advance
4	Informal RFQ — wide County discretion to reject any bid without protest recourse	Ensure lowest price AND complete compliance; informal procurement has fewer protest protections
5	60-hour scope may expand in production — no IDIQ or task-order structure	Flag out-of-scope work mechanism; propose hourly rate for additional services in proposal

NEXSTAIR WIN STRATEGY (RSP FRAMEWORK)

- NetDocuments authorization is the primary qualifier — confirm this before any other bid preparation step.
- Lowest price wins. Research current eDOCS Government-tier service rates; aim for the floor.
- Answer all 5 mandatory portal questions completely and precisely — any omission is an automatic disqualifier.
- Emphasize a rapid start date — the County wants the upgrade completed promptly; propose the earliest credible mobilization date.
- Nexstair RSP Value: Draft the 5 mandatory bid question responses, prepare the technical methodology narrative for the eDOCS upgrade, and identify eligible primes from the 43-company bidder list (14 highly relevant including CDI, Konica Minolta, Northwoods Consulting Partners, HTC Global Services, AmeXio Group).
- Note: Same buyer (Martin O'Sullivan, 914-231-1315) as Construction Software RFB — any prime with an active Westchester County vendor relationship has a communication advantage.
- Beware Clause 17: County may no-award if it finds lower pricing elsewhere. Price must be genuinely competitive.

CONTACT DIRECTORY

PRIMARY CONTACT	Martin A. O'Sullivan, Bureau of Purchase and Supplies
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EMAIL	maoc@westchestercountyny.gov
SUBMISSION METHOD	Electronic via Empire State Purchasing Group portal
DELIVERY ADDRESS	111 Dr. Martin Luther King Jr. Blvd., White Plains, NY 10601
AGENCY WEBSITE	Westchester County Purchasing Portal

COMPETITIVE LANDSCAPE & MARKET INTELLIGENCE

- 43 companies accessed the bid; 14 highly relevant prime candidates (authorized NetDocuments/IT specialists), 29 partially relevant.
- Top highly relevant primes: CDI (Hudson, WI), Konica Minolta Business Solutions (Vienna, VA), Northwoods Consulting Partners (Dublin, OH), HTC Global Services (Troy, MI), Elegant Enterprise-Wide Solutions (Aldie, VA),

AmeXio Group (New York, NY).

- NetDocuments authorization requirement eliminates the majority of generic IT consultants — effective field narrowing to 14 truly qualified bidders.
- Same contracting officer (Martin O'Sullivan) and same bureau as RFB-WC-26200 Construction Software — primes with existing vendor relationships have relationship advantage.
- Informal RFQ under Empire State Purchasing Group — Clause 17 gives County broad discretion to no-award; price aggressively but verify cost floor.
- Revenue potential: \$900–\$5,000 per engagement depending on prime and scope of support.
- No incumbent identified — eDOCS upgrade suggests the County's current system has not been upgraded recently; first credible proposal with low price likely wins.

NAICS / NIGP CLASSIFICATION

NAICS CODE	541519 — Other Computer Related Services
NIGP CODE(S)	91829 (Computer Software Consulting); 92064 (System Implementation & Engineering Services)
SET-ASIDE	Full and Open — No Set-Aside; MBE/WBE/SDVOB encouraged
AWARD METHOD	Lowest Responsive Bidder — Informal RFQ (Wide Discretion)

This case study was prepared by Nexstair Technologies LLC as internal procurement intelligence for white-label RSP operations. For prime contractor use only. Not for public distribution. All source data derived from publicly issued solicitation documents. Verify all details against the official solicitation before submission. — info@nexstair.com