

Request for Quotes: SharePoint Document Management System Setup and Migration/Organization

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Intended audience: Consultant(s) with experience in SharePoint and the organization of documentation management systems involving files of varying formats and uses.

EarthScope point of contact

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Introduction

The EarthScope Consortium is a university consortium and 501(c)(3) nonprofit that was formed from the [merger](#) of two similar organizations (IRIS and UNAVCO) at the beginning of 2023. EarthScope supports transformative global geophysical research and education in the earth sciences, operating the GAGE and SAGE large facility awards on behalf of the U.S. National Science Foundation. Through these activities, EarthScope is responsible for the operation and maintenance of geophysical networks around the world. It also conducts engineering and instrument-related operations across all relevant NSF programs, which includes developing, maintaining, and organizing a vast array of technical information and documentation. EarthScope's Instrumentation Services directorate currently uses several document management systems (DMSs) with varying degrees of usage, organization, and upkeep by the programs/sub-groups within the directorate. In an effort to ensure accessibility/sharing of information and standardization across these programs/sub-groups, EarthScope's Instrumentation Services directorate is moving to a singular DMS.

Scope

The Common Sensor Platform (CSP) project, led by the Instrumentation Services directorate spanning the GAGE and SAGE facilities, developed a full requirements list for the handling of documents relating to the CSP and more broadly the engineering and instrument-related operations. Utilizing this requirements list, EarthScope's current DMSs (SharePoint, GoogleDrive, DropBox, and Confluence) were evaluated and SharePoint was selected for use as the singular DMS for the Instrumentation Services directorate.

For the next phase of this project/process we are seeking support to (1) setup the framework/structure of the unified SharePoint DMS, (2) assist in the migration and organization of documentation/information into the new DMS, and (3) provide guidelines/best practices on use and maintenance of the DMS.

Timeline

- 5/14/2024- Release of Request for Quotes

- 6/7/2024 - Vendors complete Q&A/Information sessions with EarthScope
- 6/7/2024 - Quotes due from vendors
- 6/28/2024 - Quotes evaluated and vendor selected
- Upon contract award, work to be completed within ~6-9 months.

Summarized Requirements

We are seeking support to set up SharePoint as the singular DMS that can handle all types of files related to the operations of EarthScope's Instrumentation Directorate. Through liaison/information gathering with the EarthScope DMS Working Group, the SharePoint Instrumentation space needs to be structured to best utilize the platform's features (library, folders, labeling/metadata, etc), workflows, reduce duplicate/redundant materials across groups, and to integrate with EarthScope's Corporate Wiki (Confluence). This setup/structure needs to streamline administrative oversight in accommodating different permission levels by both groups and users. The second component of this project is the actual migration and organization of files/information from their various current locations into the new singular SharePoint DMS and as a part of this process develop folder and file naming conventions. Lastly, we are requesting assistance on developing straightforward training(s) and guidelines/best practices documentation so the DMS can be utilized by Instrumentation staff not only during the transition to SharePoint but for its maintenance/upkeep.

Additional Context: EarthScope's Instrumentation Directorate is composed of ~70 employees with an additional 10+ employees from other directorates that interface/cross-collaborate frequently and will interact with the DMS on a regular basis. Currently three DMS's are utilized by the Instrumentation Directorate (Google Drive, DropBox, and NextCloud) to varying degrees (both in shared/collaborative and personal spaces), in addition to personal spaces/computer hard drive systems. All files are electronic and no scanning services are required. A small percentage of files (<2%) will require workflow integration (editing stages, signatures, approvals). EarthScope currently has a SharePoint license with 9PB of available storage space. Currently, only EarthScope's Administrative Directorate utilizes SharePoint.

NextCloud	GoogleDrive	DropBox
Folders: 21,699 Files: 306,770 Storage: 790GB Accounts: 1 (Corporate)	Folders: unknown Files: unknown Storage: 128GB Accounts: 1 (Corporate)	Folders: 26,100 Files: 660,000 Storage: 11,000GB Accounts: 12
<p>* Current Total Space/Storage (from above): ~12TB</p> <p>* Expected Total Space/Storage (+25%, accounting for personal files, spaces that may have been missed,etc): ~15TB</p> <p>* Future expected Space/Storage Growth (doubled current, for 10-15 yrs): ~24TB</p>		

Data/Information Types: Include, but are not limited to, instrument specification sheets, drawings, CAD files, design documents, spreadsheets with calculations, standard operating procedures (SOP's), test reports, and information relating to certain experiments

File Types:

- Frequently used: pdf, doc, docx, ppt, epub, mp4, ai, jpeg, png, gif, zip, etc.
- Others: vsdx, bat, log, exe, py, obs, txt, stm, kml, prj, cfg, cvs, etc

Discovery, Design, and Migration: In the discovery and subsequent design phase, all three of EarthScope's existing DMSs must be evaluated/considered. The migration phase to SharePoint may be tiered, with full migration of NextCloud, partial migration of GoogleDrive (shared spaces only), and no migration of DropBox (alternatively, the creation of training resources for individuals to migrate data themselves). The total size of data to be migrated is not expected to exceed the 12 TB total from above.

Response Requirements

- Description of SharePoint subject matter expertise and experience (years and # of projects)
- Description of Document Management System subject matter expertise and experience (years and # of projects)
- Overview of implementation and migration plan/roadmap and timeline
- Itemized budget proposal (total available funding to support this work is not to exceed \$55K)
- Proposed employee training/guidance methods