



Vendor Name:

TARRANT COUNTY
PURCHASING DEPARTMENT

JACK BEACHAM, C.P.M.
PURCHASING AGENT

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ASSISTANT PURCHASING AGENT

RFP NO. 2013-053

**REQUEST FOR PROPOSALS
FOR
COMPREHENSIVE ENTERPRISE
CONTENT MANAGEMENT SYSTEM
AND IMPLEMENTATION SERVICES**

**PROPOSALS DUE MARCH 14, 2013
2:00 P.M.**

RFP NO. 2013-053

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**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

PRE-PROPOSAL CONFERENCE

All Respondents interested in submitting proposals should attend the scheduled Pre-Proposal Conference to be held as follows:

DATE: WEDNESDAY, FEBRUARY 27, 2013

TIME: 10:00 A.M.

**LOCATION: TARRANT COUNTY ADMINISTRATION BUILDING
PURCHASING DEPARTMENT CONFERENCE ROOM
100 E. WEATHERFORD, SUITE 303
FORT WORTH, TEXAS 76102**

Persons with disabilities requiring special accommodation should contact Dianna Lee at (817) 884-1143 at least two (2) days prior to the Pre-Proposal Conference.

RSVP: Respondents planning to attend the pre-proposal conference should RSVP, in writing, via facsimile, no later than 5:00 p.m., Tuesday, February 26, 2013.

Send RSVPS to Dianna Lee at (817) 884-1143.

Questions from Respondents will be addressed at the pre-proposal conference. Any Respondent who submits a proposal without attending the scheduled pre-proposal conference does so at his own risk. Such Respondent who submits a proposal and does not attend the pre-proposal conference waives any right to assert claims due to undiscovered conditions.

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

Tarrant County is soliciting proposals for a **COMPREHENSIVE ENTERPRISE CONTENT MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES** for the **INFORMATION TECHNOLOGY DEPARTMENT**.

THE ORIGINAL AND TWELVE (12) COPIES
OF
COMPLETED PROPOSALS
MUST BE RECEIVED IN THE
PURCHASING DEPARTMENT
AT 100 E. WEATHERFORD, SUITE 303
FORT WORTH, TEXAS 76102
ON OR BEFORE MARCH 14, 2013 AT 2:00 P.M.

All proposals, including a "NO BID", are due in the Purchasing Department by the due date, in sealed envelopes or boxes. **All proposals must be clearly marked with the RFP Number, the name of the company submitting the proposal, and date and time of opening on the outside of the envelope/box and/or Air Bill/Delivery Receipt.** Original proposal must be clearly marked "ORIGINAL" and contain all original signatures.

Any proposal received after the date and/or hour set for RFP opening will not be accepted. Respondent will be notified and will advise Tarrant County Purchasing as to the disposition by either pick up, return at respondent's expense, or destroyed with written authorization of the Respondent. If proposals are sent by mail to the Purchasing Department, the respondent shall be responsible for actual delivery of the proposal to the Purchasing Department before the advertised date and hour for opening of RFPs. If mail is delayed either in the postal service or in the internal mail system of Tarrant County beyond the date and hour set for the RFP opening, proposals thus delayed will not be considered and will be disposed of as authorized.

Proposals may be withdrawn at any time prior to the official opening. Alterations made before opening time must be initialed by proposer/respondent guaranteeing authenticity. After the official opening, proposals become the property of Tarrant County and may not be amended, altered or withdrawn without the recommendations of the Purchasing Agent and the approval of Commissioners Court.

Tarrant County is exempt from Federal Excise and State Sales Tax. The County is not exempt from Surplus Lines Tax or Texas Stamping Tax. Therefore, only applicable taxes must be included in this proposal.

No oral explanation in regard to the meaning of the proposal specifications will be made and no oral instructions will be given before the award of the contract. Request from interested proposers for additional information or interpretation of the information included in the specifications and all questions should be directed in writing, via facsimile, to:

**DIANNA LEE, C.P.M., SENIOR CONTRACTS ADMINISTRATOR
FAX: (817) 884-2629**

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All documents associated with this RFP including but not limited to, the proposal document, questions and their responses, addenda and special notices will be posted under the RFP number on the Tarrant County website and available for download by respondents and other interested parties. It is the bidders'/respondents' sole responsibility to review this site and retrieve all related documents up to and including the Proposal due date.

The deadline for receipt of all written questions shall be 12:00 (Noon), Fort Worth time, Thursday, February 28, 2013. All questions and their responses will be posted on the website and available for download by bidders after the deadline for questions.

Proposal Response Forms must be fully completed and included in your response. Forms that have been retyped or altered may result in rejection of proposal.

This RFP is issued in compliance with the County Purchasing Act, Section 262.030. Negotiations shall be conducted with responsible vendor(s) who submit proposals determined to be reasonably susceptible of being selected for award.

CONFIDENTIALITY: Any material that is to be considered confidential in nature must be clearly marked as such and shall be treated as confidential to the extent allowable in the Open Records Act. Pricing information is not considered confidential. Trade secrets or confidential information **MUST** be placed in a separate envelope marked "**CONFIDENTIAL INFORMATION**" and **EACH PAGE** must be marked "**CONFIDENTIAL INFORMATION.**" Tarrant County will make every effort to protect these papers from public disclosure as outlined in Government Code, Chapter 552.

"The Texas Public Information Act gives the public the right to request access to government information, subject to certain narrow exceptions. Tarrant County is an entity subject to this Act. Therefore, please be advised that your company's declaration that certain information submitted in response to an RFP is "confidential" will not be treated as such if the County receives a request for a copy of the RFP. The County will of course make every effort to inform your company of such a request and to provide you with an opportunity to object to the release of any proprietary information, but Tarrant County cannot and will not make an agreement to withhold information from the public contrary to the County's responsibilities under the Act."

Additionally, to the extent your response is incorporated into the contract, that contract will become an official record available for public inspection.

Proposals shall be opened so as to avoid disclosure of contents to competing offerors and kept secret during the process of negotiation. All proposals that have been submitted shall be open for public inspection after the contract is awarded, except for trade secrets and confidential information contained in the proposals and identified as such.

The successful Contractor shall defend, indemnify, and hold harmless Tarrant County from any and all liability or loss of any nature whatsoever arising out of or relating to the Contractor performing work on County premises, including, without limiting the generality of the foregoing coverage, any act or omission of the contractor, its agents, servants, employees, or invitees in the execution or performance of the contract.

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Continuing non-performance of the vendor in terms of Specifications shall be a basis for the termination of the contract by the County. The County shall not pay for work, equipment, or supplies which are unsatisfactory. Vendors will be given a reasonable opportunity before termination to correct the deficiencies. This, however, shall in no way be construed as negating the basis for termination for non-performance.

The **contract may be terminated** by either party upon written thirty (30) days notice prior to cancellation.

Proposals will be considered irregular if they show any omissions, alteration of form, additions or conditions not called for, or irregularities of any kind. However, Tarrant County reserves the right to waive any irregularities and to make award in the best interest of the County.

Tarrant County reserves the right to accept or reject in part or in whole any proposals submitted, and to waive any technicalities for the best interest of the County. Proposals may be rejected, among other reasons, for any of the following specific reasons:

1. Proposals received after the time limit for receiving proposals.
2. Proposals containing any irregularities.
3. Unbalanced value of any items.

Vendors may be disqualified and their proposals not considered, among other reasons, for any of the following specific reasons:

1. Reason for believing collusion exists among the Vendors.
2. Reasonable grounds for believing that any Vendor is interested in more than one Bid for the work contemplated.
3. The Vendor being interested in any litigation against the County.
4. The Vendor being in arrears on any existing contract or having defaulted on a previous contract
5. Lack of competency as revealed by a financial statement, experience and equipment, questionnaires, etc.
6. Uncompleted work which in the judgement of the County will prevent or hinder the prompt completion of additional work, if awarded.
7. Respondents shall not owe delinquent property tax in Tarrant County.

It is the Respondent's sole responsibility to print and review all pages of the RFP document, attachments, questions and their responses, addenda and special notices. The Proposal Signature Form must be signed and returned. Failure to provide signature on this form renders proposal non-responsive. Failure to complete and the submission of all required forms, including but not limited to the RFP Signature Page, Reference Page, Certification of Eligibility, Questionnaires (when applicable), Addenda (including revised forms), and any other specified forms or documents will be grounds for rejection of entire response.

Due care and diligence has been used in preparation of this information, and it is believed to be substantially correct. However, the responsibility for determining the full extent of the exposure and the verification of all information presented herein, shall rest solely with the proposer. Tarrant County and its representatives will not be responsible for any errors or omissions in these specifications, nor for the failure on the part of the proposer to determine the full extent of the exposures.

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The successful proposer/respondent may not assign their rights and duties under an award without the written consent of the Purchasing Agent. Such consent shall not relieve the assignor of liability in the event of default by the assignee.

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

SPECIAL TERMS AND CONDITIONS OF THE CONTRACT

I. MINIMUM INSURANCE REQUIREMENTS

- A. The Respondent shall take out, pay for and maintain at all times during the prosecution of the work under the contract, the following forms of insurance, in carriers acceptable to and approved by Tarrant County.
1. Workers' Compensation/Employer's Liability
 - a. Worker's Compensation — statutory
 - b. Employer's Liability — \$500,000
 2. Comprehensive Commercial General Liability:
 - a. Bodily Injury/Personal Injury — \$1,000,000 per occurrence
\$2,000,000 aggregate
 - b. Property Damage — \$1,000,000 aggregate
 3. Professional Liability/Errors and Omissions — \$1,000,000
- B. The County reserves the right to review the insurance requirements of this section during the effective period of the contract and to require adjustment of insurance coverage and their limits when deemed necessary and prudent by the County based upon changes in statutory law, court decisions, or the claims history of the industry as well as the Respondent.
- C. Required Provisions:
1. Proof of Carriage of Insurance - All certificates of insurance will be required in duplicate and filed with the Purchasing Agent and the Budget and Risk Management Department at 100 East Weatherford Street.
 2. All certificates shall provide Tarrant County will receive an unconditional thirty days written notice in case of cancellation or any major change.
 3. As to all applicable coverage, certificates shall name Tarrant County and its officers, employees, and elected representatives as an additional insured.
 4. All copies of the certificates of insurance shall reference the project name and bid number for which the insurance is being supplied.
 5. The Respondent agrees to waive subrogation against Tarrant County, its officers, employees, and elected representatives for injuries, including death, property damage, or any other loss to the extent the loss, if any, is covered by the proceeds of insurance.
 6. The Respondent is responsible for making sure any sub-contractor(s) performing work under this agreement has the required insurance coverage(s) and supplies Tarrant County with the proper documents verifying the coverage.

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
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GLOSSARY OF ACRONYMS USED IN SPECIFICATIONS/SCOPE OF WORK

1. ADA – The Americans with Disabilities Act of 1990.
2. API –Application Programming Interface.
3. CAS – Content Addressed Storage.
4. CFR – Code of Federal Regulations.
5. CIFS – Common Internet File System.
6. CJIS – Criminal Justice Information Services.
7. CMIS – Content Management Interoperability Services.
8. CP – Communication Plan.
9. CSV – file type-Comma Separated Values.
10. DAF –Document Archive Files.
11. DMS – Document Management System.
12. DOD 5015.02 version 3 – Standard established by the Department of Defense (DoD) that defines the basic requirements that must be met by records management application products acquired by the DoD and requirements for managing classified records.
13. ECMS – Enterprise Content Management System.
14. ERMS – Electronic Records Management System.
15. FIPS – Federal Information Processing Standards.
16. FOIA – The Freedom of Information Act generally provides that any person has a right, enforceable in court, to obtain access to federal agency records, except to the extent that such records (or portions of them) are protected from disclosure by one of nine exemptions.
17. HIPAA – Health Insurance Portability and Accountability Act of 1996.

The HIPAA Privacy Rule provides federal protections for personal health information held by covered entities and gives patients an array of rights with respect to that information. At the same time, the Privacy Rule is balanced so that it permits the disclosure of personal health information needed for patient care and other important purposes.

The Security Rule specifies a series of administrative, physical, and technical safeguards for covered entities to use to assure the confidentiality, integrity, and availability of electronic protected health information.
18. ISO 27001 (International Organization for Standardization) – Specifies the requirements for establishing, implementing, operating, monitoring, reviewing, maintaining and improving a documented Information Security Management System within the context of the organization's overall business risks. It specifies requirements for the implementation of security controls customized to the needs of individual organizations or parts thereof.

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GLOSSARY OF ACRONYMS USED IN SPECIFICATIONS/SCOPE OF WORK

19. ISO 15489 (International Organization for Standardization) – The International Standard on Records Management ISO 15489, provides guidance on creating records policies, procedures, systems and processes to support the management of records in all formats.
20. ISO/IEC 27002 (International Organization for Standardization/International Electrotechnical Commission) – Establishes guidelines and general principles for initiating, implementing, maintaining, and improving information security management in an organization. The objectives outlined provide general guidance on the commonly accepted goals of information security management.
21. ISO 15836 (International Organization for Standardization) (aka Dublin Core Metadata Element Set) – ISO 15836:2009 defines the elements typically used in the context of an application profile which constrains or specifies their use in accordance with local or community-based requirements and policies.
22. JRE – Java Runtime Environment.
23. Metadata – Data about a record or content item such as author, creation date, etc. which allows identification, helps locate and/or relate, and supports lifecycle management of the record or content item.
24. MVITS – Motor Vehicle Inventory Tracking System.
25. NAS – Network Attached Storage.
26. PA Records Management – The Privacy Act works in tandem with the FOIA to regulate federal agency records about individuals, restricting the disclosure of personal information that might violate privacy while allowing individuals access to records about themselves.
27. PII – Personally Identifiable Information.
28. PM – Project Manager.
29. PMP – Project Management Plan.
30. QAS – Quality Assurance Standards.
31. RCAMS – Records Control and Management System.
32. RFID – Radio-frequency Identification.
33. SAN – Storage Area Network.
34. SOA – Service Oriented Architecture.
35. SOAP – Simple Object Access Protocol.
36. TCRC – Tarrant County Records Center.
37. UDDI – Universal Description, Discovery and Integration.
38. UNC – Universal Name Convention.
39. W3C – World Wide Web Consortium (W3C); an international community that develops open standards to ensure the long-term growth of the Web.
40. WCMS – Web Content Management System.
41. WSDL – Web Services Description Language – An XML-based interface description language that is used for describing the functionality offered by a web service.

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SPECIFICATIONS/SCOPE OF WORK

I. INTRODUCTION/BACKGROUND:

- A. Tarrant County is requesting proposals from all interested firms to provide a Comprehensive Enterprise Content Management System and Implementation Services. The Request for Proposal (RFP) includes project implementation, training, conversion services, project management services and on-going support of the solution after implementation. The desired solution should improve the efficiency of content storage, retention, distribution, retrieval, and printing and automate the County's content retention policies and procedures. Providing reliable and effective access to County records for employees and citizens is a critical County service. The solution should provide accessibility to electronic records on-line through web portals and on contemporary mobile technologies.
- B. The Tarrant County Records Management Division of the Information Technology Department manages records for all Tarrant County departments at the Tarrant County Records Center (TCRC) located approximately twenty (20) miles from downtown Fort Worth. These paper records are maintained using software that was purchased over ten (10) years ago. Electronic records are maintained by software that was originally purchased in 1997. Many Tarrant County departments are represented in this repository. Both types of records are maintained on separate systems and licensed by different software vendors.
- C. Rather than upgrade the County's current systems, the County has chosen to issue an RFP to explore all options to ensure the most advantageous solution for the County. Tarrant County desires one (1) system that includes Enterprise Content Management and Electronic Records Management to replace the existing systems. Tarrant County prefers a single, integrated solution provided by one (1) contractor.

II. SOLUTION OBJECTIVES:

- A. The County generates large amounts of electronic and paper documents annually. To better manage repository content and reduce the amount of paper generated, the County is seeking to implement an enterprise wide content management system that effectively captures, manages, stores, tracks, retrieves, archives and delivers through printing and electronic transfer both structured and unstructured content. The objectives are to:
 - 1. Provide enhanced user experience with a user friendly interface that provides consistent, organized design and logical navigation.
 - 2. Provide an integrated strategy for capture, storage, collaboration, management and delivery of electronic content.
 - 3. Provide a solution that has high availability allowing for no single point of failure.

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SPECIFICATIONS/SCOPE OF WORK

II. SOLUTION OBJECTIVES: (cont.)

4. Establish standards for content creation, storage, workflow, publication and security.
 5. Provide a secure and stable repository for the County content.
 6. Provide intuitive search and retrieval of content across County departments.
 7. Provide a scalable repository to meet the growing needs of the County and its departments, including expansion of user base and processing volumes.
 8. Create a centralized repository for all County employees to share content electronically.
 9. Convert processes into electronic workflows that can be routed and easily tracked.
 10. Comply with County policies, procedures, legal and regulatory requirements with regard to content retention.
 11. Provide integration for common Web Content Management Systems (WCMS).
 12. Provide consumption and creation of records through on-line web portal and contemporary mobile device technologies.
- B. Tarrant County is interested in vendors who can provide software solutions competent in incorporating today's technologies with scaling capabilities for growth to satisfy demands of Tarrant County's business needs. Technological evolution and innovations mandate Tarrant County's constant awareness and adaptation to the current trends in business, technology, web content management, smart phone technologies, and social media while looking forward to new and emerging trends. Incorporating contemporary technologies and potential business and technological innovations into the Tarrant County business forecast is imperative to the success and growth of Tarrant County. Progressive, innovative and forward thinking business solutions will enhance the service Tarrant County provides to its constituents, businesses, and all local communities.

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SPECIFICATIONS/SCOPE OF WORK

III. PROJECT SCOPE:

- A. The overall scope of the project is to provide a completely integrated single comprehensive Enterprise Management/Records Management solution implemented and supported by a single respondent. The scope also includes:
1. **Project Management** – The Project shall be managed per the Project Plan developed and maintained by the selected contractor. The contractor shall designate an experienced Project Manager with a proven track record of success with several successful ECMS deployments.
 2. **Implementation Services** – Respondent shall have an established and proven implementation methodology. The Respondent should supply a detailed list of all software related licensing and conditions to implement the system at the system level and the desktop level.
 3. **Conversion/Migration Services** – All existing County records management data stored in the current document management system and records management system must be converted over to the selected contractor's solutions. This includes, but is not limited to, extracting data, images, annotations and indices from the existing system and importing the same content into the selected contractor's solution. All conversion activity must take place on-site.
 4. **Training** – The contractor will provide training to ensure a transfer of knowledge and to prepare County staff to support the new system. The contractor shall provide training plans and training documentation supporting the system's functionality, business processes and other training needs. Training will be customized by organizational role.
 5. **Systems Maintenance and Technical Support** – The contractor will provide software maintenance and on-going technical support which includes telephone, web-based and/or onsite technical support. Technical support shall include integration with Web Content Management System (WCMS) technology.
- B. The contractor will provide detailed software and hardware requirements to implement the system. Contractor will include specifications for all hardware to implement the solution and ensure the system operates at maximum efficiency. **DO NOT INCLUDE COSTS FOR HARDWARE.** Tarrant County will provide support and maintenance for all hardware.

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SPECIFICATIONS/SCOPE OF WORK

IV. SYSTEM AND NETWORK ENVIRONMENT:

A. INFORMATION TECHNOLOGY CURRENT ENVIRONMENT SUMMARY

1. The Tarrant County Information Technology data center supports more than 5600 active users on approximately four hundred thirty (430) physical and virtual servers. Physical servers consist of various rack models from Dell™. The storage environment consists of enterprise class systems including Storage Area Network, Network Attached Storage and Content Addressable Storage.
2. Primary database servers use Microsoft® SQL Server® 2008 R2 Enterprise Edition and are configured as active/active clusters. Microsoft SharePoint® 2010 is used for internal portal and content management system purposes. Microsoft Exchange Server 2007 is used for email.

B. NETWORK:

1. The County's physical network consists of approximately seventy-five (75) locations using a combination of private fiber and leased connections from AT&T™. The Plaza Data Center has various switches and routers configured with 10Gbps or 1Gbps Ethernet segments. All downtown campus buildings are connected to the Plaza Data Center using 1Gbps connections. Remote locations use a 100Mbps Metropolitan Area Network or a T1 Point to Point link, depending on office size.

V. SECURITY:

- A. Contractors will be required to supply a criminal background check less than twelve (12) months old with nationwide scope on all consultant and project personnel assigned to Tarrant County projects with the following scope: Federal and County Criminal check seven (7) years back. State and National Sex Offenders seven (7) years back, (felonies only), Nationwide Wants and Warrants (current). Background check must be submitted for approval by the Tarrant County Chief Security Officer. Contractors are responsible for all costs associated with the criminal background check and approval by Tarrant County is required before consultant and project personnel may work onsite. Existing U.S. Department of Defense Security Clearances are not sufficient. The consultants /contractors shall also be responsible for signing a standard confidentiality agreement.

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SPECIFICATIONS/SCOPE OF WORK

VI. CURRENT ELECTRONIC DOCUMENT MANAGEMENT SYSTEM ENVIRONMENT:

A. DESKTOP SOFTWARE:

1. ASG-DocumentDirect®:
 - a. Windows-based viewer that presents content from the repository.
 - b. Financial Users (approximately 573) are configured to pull up ASG-DocumentDirect 4.3.6 from SAP® using the same logon authentication built into ASG-ViewDirect® for Networks.
 - c. Other users manually access ASG-DocumentDirect 2.3 using individual Active Directory passwords.
 - d. User desktops run on Windows XP or Windows 7.

B. SERVER SOFTWARE:

1. ASG-DocumentDirect for the Internet 4.4.1.1:
 - a. Web-based viewer that presents content from the repository.
 - b. External facing version is configured to log on as the same user using authentication built into ASG-ViewDirect for Networks.
 - c. Internal users manually access using individual Active Directory passwords.
 - d. ASG-DocumentDirect for the Internet 4.4.1.1 is running on VMware servers on Windows Server with Tomcat™ 7.0.8 as the web application server.
2. ASG-ViewDirect for Networks 4.2.9.1/4.4.0:
 - a. Repository that captures/archives, stores, secures, and retrieves content.
 - b. External facing version is 4.4.0. Internal version is 4.2.9.1.
 - c. ASG-ViewDirect for Networks 4.2.9.1/4.4.0 is running on VMware servers on Windows Server and uses SQL Server 2008.

******There are approximately 2 million archives stored in a proprietary format .DAF (Document Archive File). Each archive may contain one or more records.**

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SPECIFICATIONS/SCOPE OF WORK

VII. CURRENT CRITICAL PROCESSES:

The proposed solution must have the capabilities to integrate with the software applications in the existing critical processes below. This software will not be replaced.

A. SAP® :

1. Invoice Processing - Auditors Office:

- a. Tarrant County utilizes ReadSoft® DOCUMENTS for Invoices software as well as SAP Interactive Forms by Adobe® in accounting processes. Both programs archive into the existing Document Management System (DMS) using SAP® R/3® RFC archiving. The volume from ReadSoft DOCUMENTS for Invoices is three hundred to five hundred (300-500) invoices per day. There are also Early and Late Archive processes developed for the ASG-ViewDirect for Networks environment utilizing SAP ArchiveLink® that several departments use for processing invoices.
- b. See Attachment A “REPOSITORY CONTENT INFORMATION”.
- c. See Attachments B–1 & B–2 “SAP EARLY ARCHIVING”.
- d. See Attachment C “SAP LATE ARCHIVING”.
- e. Both ReadSoft DOCUMENTS for Invoices and SAP Interactive Forms by Adobe utilize SAP R/3 RFC Archiving to store files in the DMS repository. ReadSoft DOCUMENTS for Invoices sends DOC, DOCX, HTML, PDF, TIF, XLS and XLSX file types to the DMS. SAP Interactive Forms by Adobe sends PDF files.
- f. See Attachment D–1 & D–2 “ARCHIVING TYPES”.

B. MAINFRAME REPORTS:

1. There are four hundred sixty–nine (469) unique mainframe reports that are sent using IP PrintWay™ on the mainframe to virtual printers configured in the existing DMS. The virtual printers are configured with a total of one hundred sixty-nine (169) templates that identify and archive the reports with indexing. Currently there are 3,238 different report types including inactive reports.

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SPECIFICATIONS/SCOPE OF WORK

C. TAX DEED CARDS:

1. Approximately two million (2,000,000) color tax deed card images are available to the public through the DMS's Internet segment (recsearch.tarrantcounty.com). Authentication for viewing is provided by the DMS's built-in authentication. Currently, single images are displayed. The customer would like to have the front and back images of these cards displayed on the same screen. We are currently using Tomcat™ with this application. For security reasons we prefer to use a web application server other than Tomcat and the Chief Security Officer has suggested JBoss®. The version of Java Runtime Environment (JRE) has been an issue with accessing the Tax Deed cards. The software has not always been up-to-date with JRE versions and the public had to downgrade their JRE to work with this application in the past. This issue has generated a large number of calls to the Tax Office.
2. See Attachment E "TAX DEED CARDS DIAGRAM".

D. REPORTS EMAILED:

1. Utilizing a command-line script with the thick-client viewer, several reports are exported to a location where a Tarrant County developed program emails the reports to specific users.

E. COMMISSIONERS COURT CLAIMS:

1. Auditor's office prints from SAP to a virtual printer configured in the DMS to capture the Commissioners Court Claims (list of checks to be approved). A template examines the content looking for tag information. If the information is there, it will archive under the Commissioners Court Claims report ID. Authentication for viewing is Active Directory.

F. CELLULAR PHONE BILLS:

1. Cellular phone bills are manually sent to a virtual printer configured in the DMS using a template that extracts the indexing information from the PDF file while archiving. Authentication for viewing is Active Directory. Sometimes the PDFs containing Unicode characters have come from the cellular vendor. In order to archive, new copies of the PDFs without the Unicode characters must be requested.

G. MEDICAL EXAMINER DIGITAL PHOTOGRAPHS:

1. Various photographs from the Medical Examiner's Office are archived using a Tarrant County developed program that issues the DMS's command line archive command adding several indexes. Authentication for viewing is Active Directory.

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H. MOTOR VEHICLE DEALER BONDS AND ASSOCIATED RECORDS:

1. These records are scanned by the Records Management Imaging Department and manually archived once or twice a year. The Tax Office uses a program called Motor Vehicle Inventory Tracking System (MVITS) by Ciber® to track vehicle tags. MVITS uses the DMS's intranet piece to pull up images of the bonds and other records. Authentication is Active Directory with the same logon. There are approximately less than ten (10) users who can pull up content from the DMS in this way.

I. AUDIO FILES:

1. There are seventeen (17) different report IDs for audio content. MP3 format files are manually archived into the DMS using the DMS's command line archive command using various indexes. The departments that have audio content are the Administrator's Office, Domestic Relations and the Medical Examiner's Office. The viewer calls up an external "viewer" like Window's Media Player. Authentication for viewing is Active Directory.

J. VIDEO FILES:

1. MPEG video files have been archived into the DMS using the DMS's command line archive command but archiving of video is limited to one (1) or two (2). The viewer calls up an external "viewer" like Window's Media Player. Authentication for viewing is Active Directory.

K. DATA MINING/ANALYSIS:

1. Several departments have utilized data mining software for mining and extracting from reports. The departments that utilize this software are Sheriff, Elections, District Attorney, Auditor, Budget, Human Resources, Purchasing and Information Technology.
 - a. Viewer Data Mining:
 - i. Auditor, Budget, Human Resources and Purchasing use the built-in data mining capabilities to view historic financial information in text reports. Tarrant County Records Information Management developed templates for extracting information. The user loads the template from within the viewer, specifies search criteria, then views and/or extracts the results which contain multiple fields pulled from multiple lines.

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L. SCANNING PROCESS:

1. Documents are scanned by the Imaging Department using Canon® scanners and indexed using PaperFlow™. The files are exported from PaperFlow and indexes are placed in an ASCII file. Images are archived using a template that adds the indexing during archive. The production document server has one hundred eighty-five (185) different report ID's and two hundred thirty-five (235) topic indexes. The departments that currently utilize imaging are:

Auditor	Medical Examiner
Domestic Relations	Public Health
Facilities	Sheriff
Historical Commission	Tax
Human Resources	Transportation
Justices of the Peace	Veterans Services
Juvenile Services	Elections

VIII. CURRENT RECORDS MANAGEMENT ENVIRONMENT:

The Tarrant County Records Center (TCRC) is the physical records storage facility for all Tarrant County departments. The TCRC is located approximately twenty (20) miles from downtown Fort Worth.

A. DESKTOP SOFTWARE:

1. Records Control and Management Software – RCAMS SQL Accession®:
 - a. This is a Windows-based application that allows users to search for and/or request hardcopy records.
 - b. Once a user has logged on to the system, a current copy of that departments records are copied from the server (via a linked table on a shared drive) to that persons desktop and stored in an Access® (Jet) database local to that desktop. All transactions made to the system by that user are made to the local database and not the SQL server. Due to issues with varying operating systems, this is **not** the preferred method.
 - c. Users manually obtain access using built-in log in accounts. Users can be normal users or departmental power users.
 - d. User desktops run on Windows XP or Windows 7.

<p style="text-align: center;">RFP FOR COMPREHENSIVE ENTERPRISE CONTENT MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES</p>
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2. Box Label Program:
 - a. Program is a windows based program developed by Tarrant County that allows users to print labels for new containers, including barcodes, at their location from their desktop.
 - b. See Attachment F "SAMPLE LABEL".

B. SERVER SOFTWARE:

1. RCAMS SQL Master[®]:
 - a. Records management software used to manage Tarrant County's physical records.
 - b. This software is running on VMware servers on Windows Server and uses SQL Server 2008.
 - c. See Attachment G "RECORDS CENTER SOFTWARE INFORMATION".
2. RCAMS SQL Monitor[®]:
 - a. This is the records management software that monitors the system for new requests from departments for files or new containers.
 - b. This software is running on VMware servers on Windows Server and uses SQL Server 2008.
 - c. On detecting new requests from customers, RCAMS SQL Monitor prints four (4) copies of a request report. The Records Center personnel will use information on the report to locate the container. If the entire container has been requested, the yellow copy of the report is left in the place of the container. If a folder from within that container has been requested, the yellow copy is placed in the container at the point where the requested item was removed.
 - d. For new containers, RCAMS SQL Monitor notifies the Record Center personnel that a new record is pending to be placed in the SQL Master. The new container information is added to the SQL Master, assigned the next sequential ID number and the four (4) basic location parameters are completed.

****** Note that the user's copy of the database will not be updated until they log in the next day as the update process runs during the night. *This is not the preferred method.***

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IX. TARRANT COUNTY RECORDS CENTER – PHYSICAL ATTRIBUTES:

- A. The existing layout of the TCRC is structured into three (3) distinct areas.
- B. The main area (M-BAY) contains shelving that has twenty-two (22) rows with ten (10) shelving units per row, and twelve (12) rows with fifteen (15) shelving units per row. A separate area contains (S-BAY) eight (8) rows with seven (7) shelving units per row. The HIPAA area (H-BAY) contains eight (8) rows with four (4) shelving units per row.
- C. Shelving units have ten (10) shelves each. Each shelf will hold thirty-six (36) standard-sized containers. Containers are shelved two (2) high, two (2) deep, and the shelves will hold nine (9) of these two-by-two (2x2) formats side-by-side, to encompass thirty-six (36) containers per shelf. Shelves are numbered one (1) to ten (10), from bottom to top. Each shelving unit will hold three hundred and sixty (360) containers. The TCRC also stores bound books (commonly called volumes) which are non-standard sizes and are stored singularly side-by-side (i.e. one (1) deep, one (1) high) and one (1) shelf may hold well over one-hundred (100) volumes. Because of a weight issue, volumes are generally assigned to the lower four shelves of a unit. Irregular/non-standard containers are assigned to the top shelf of a shelving unit.

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X. SYSTEM REQUIREMENTS CHECKLIST:

A. CORE REQUIREMENTS:

		Yes	No
1.	The contractor must convert all existing county records management data stored in the current document management system and records management system to the selected contractor's solution. This includes, but is not limited to, extracting data, images, annotations, metadata, and indices from the proprietary format on the existing system and importing the same content in its original format into the selected contractor's solution. All conversion activity must take place on site.		
2.	Must use an industry standard (or non-proprietary) file format to store records and content to enhance interoperability.		
3.	Must be capable of interfacing with SAP R/3 and all updates to this.		
4.	Must be capable of interfacing with ReadSoft Documents for Invoices and all updates to this.		
5.	Must be capable of interfacing with Adobe Forms for SAP and all updates to this.		
6.	Must have ability to capture print streams using virtual printer technology.		
7.	Must be able to integrate with external third-party repositories, external Enterprise Content Management Systems, external Electronic Records Management Systems (ERMS) Web Content Management System (WCMS), workflow and other document management components.		
8.	Must be able to display documents when called upon from within SAP (ArchiveLink®) including invoices created under previous DMS (after migrated to new ECMS) and new invoices created under the new ECMS.		
9.	Must run on Windows Server 2008 (64-bit) or greater using SQL Server 2008 or greater.		
10.	Contractor must provide data model including all database layouts, field definitions and relationships.		
11.	Must run on VMware vSphere™ 4 or greater.		
12.	All server and desktop software must be web-enabled.		
13.	Must be capable of supporting multiple servers and standardized non-alterable write-once storage solutions in a distributed manner.		
14.	Must be able to deploy without a single point of failure. Load Balancing is <i>desired</i> .		
15.	Must be able to integrate these technologies: NAS/CIFS, SAN, Tape, and Optical Storage.		
16.	Must support scalable storage capacity in more than one (1) location to align with Disaster Management Strategy.		
17.	Must provide ability to define retention schedule independent of media storage.		
18.	Must utilize CMIS 1.1 or greater for application programming interfaces.		
19.	Must provide role-based security across all templates, content, processes and repositories for individual users, groups of users, individual domains and sites, individual directories and subdirectories and domains. This must be integrated with Active Directory.		
20.	Must be compliant with relevant laws, regulations, and standards such as DOD 5015.2 Version 3 or higher (including Baseline Records Management, Classified Records Management, FOIA & PA Records Management), HIPAA, Federal Information Processing Standards (FIPS) 140-2 and 197, Criminal Justice Information Services (CJIS) Security Policy, v.5.1, ISO 27001 and Personally Identifiable Identification.		

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A. CORE REQUIREMENTS: (Cont.)

		Yes	No
21.	The proposed system must include security safeguards to ensure compliance with the HIPAA regulations outlined in 45 CFR Parts 160 and 164.		
22.	Must be able to implement industry best practice information security management. (ISO/IEC 27002)		
23.	Must be able to immediately revoke all privileges from a specified group or selected user(s) thereby preventing access to the system.		
24.	Must ensure all systems use strong authentication mechanisms and encrypt in both directions when accessing system resources.		
25.	Must prevent unauthorized deletion of records.		
26.	Must prevent any modification of a record's unique identifier, once it is defined unless for an authorized redaction or expungements function.		
27.	Must prevent over-writing of a record unless for an authorized redaction or expungements function.		
28.	Must be able to expunge specified record or records.		
29.	Must have complete, comprehensive and secure audit logging ability that cannot be deactivated or altered except in cases of expungements that captures information on all activities managing the logs as a record. Must include ability to remove identifiable information/records about expunged records from audit logs but not the expungement action itself. Must track who assigns which rights to which users, maintain records of searches performed in the repository, and track what data is accessed and/or changed.		
30.	Must allow for the export of the audit log data into CSV, XML or a standard delimited file format.		
31.	Must have the ability to utilize Universal Name Convention naming at all levels.		
32.	Must support Unicode.		
33.	Must have a United States based support center and support must originate from that center.		
34.	Cost for all training must be included within the Proposed Financial Response (Pages 63–65)		
35.	Must provide web portal access via industry standard browsers (Internet Explorer, Chrome, Mozilla Firefox®, etc.) and must run as a regular user (no Power User or Administrator rights required). Mobile browser access is required .		
36.	Must provide complete documentation including user, installation, administration, and operations information.		

Proposed system must be compatible and interface with Tarrant County's existing infrastructure and meet all core requirements listed above. Any proposal that includes a system not compatible with Tarrant County's existing infrastructure and/or fails to meet the core requirements listed above may be disqualified and not considered for award.

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A. CORE REQUIREMENTS: (Cont.)

Does your proposed system perform in Tarrant County's infrastructure and meet or exceed all the core requirements listed above?

Yes _____ No _____

Comments/Explanation:

B. GENERAL REQUIREMENTS:

Usability/User Interface		Yes	No	With Modifications
37.	Should support quick and easy retrieval of records and/or content allowing any operator to accomplish tasks with a minimum of confusion, delay and/or instruction at all locations.			
38.	Should provide a highly customizable user interface including drop list capabilities to identify valid values for screen fields. Should be customizable by Tarrant County personnel on an as needed basis without requiring contractor and/or consultant intervention and contractor should provide tools to customize.			
39.	The solution should use HTML (may use Javascript) but should not employ ActiveX® Controls or Java applets.			
40.	With a single key press, contextual help should be provided including screen level and field level support.			
41.	Should provide a graphical explorer interface to allow users to browse the system according to security privileges and user rights without undertaking a formal search (similar to Windows Explorer).			
42.	Complex database queries and transactions should allow other transactions to process on the server or on client desktops.			
43.	Should provide a single user interface which is capable of searching multiple ECM repositories (based on users' access and viewing privileges) simultaneously and collating the results.			
44.	Should provide system administrators the ability to define the limit of search results returned in total and per page.			
45.	Should support the use of Boolean operators (and; or; not) and/or pattern match/wild cards to refine searches across all metadata elements and/or content, across all repositories.			

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SPECIFICATIONS/SCOPE OF WORK

B. GENERAL REQUIREMENTS: (Cont.)

Usability/User Interface		Yes	No	With Modifications
46.	Should support case sensitivity/insensitivity search options and duplicate removal from search results.			
47.	Should provide the ability to interrupt a search, cancel a search, and/or further restrict the number of search returns.			
48.	Should provide for date comparisons, start and end range, calculate and count searching to all users, according to their security access profile.			
49.	Should have ability to cluster results into categories based on metadata element values and defined taxonomies.			
50.	Should allow users to, unless permissions restrict, export content and/or records in their original format or export after conversion into PDF, TIF, JPG, etc.			
51.	Should work at all locations without degradation of application speed.			
52.	Should not limit length of content names, report names, report section names, indexes, and metadata.			
53.	Should support high speed printing in a Windows environment.			
54.	Should allow multiple active sessions on same desktop with no additional licensing requirements.			
55.	All transactions should provide a progress feedback on the user's screen.			
56.	Should provide the ability for end-users to print, design, navigate forwards and backwards over successive pages of search results, save and name searches.			
57.	Should provide for phonetic and soundex search across all metadata elements and/or content, across all repositories.			
58.	Should have minimal or no configuration to the desktop.			
59.	Should have ability to search within search results, select new search, display number of matches, display search results in context, and highlight matching words.			
60.	Should provide data validation for indexing including spell checking.			
61.	Should provide the ability to support federated searching.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

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B. GENERAL REQUIREMENTS: (Cont.)

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

Records		Yes	No	With Modifications
62.	Should be able to manage multiple repositories and data stores.			
63.	Should enable Administrators and authorized users the ability to create, apply and view legal, historical or other holds on records including multiple holds on a record or group of records. Administrators should have the additional ability to remove holds. Contractor should indicate whether hold records are preserved in a read-only manner or preserved as a copy of records in a "point-in-time" manner.			
64.	Should be able to identify hold content sources (data mapping for records on hold).			
65.	Should allow implementation of a department-specific scheme for how records and content are organized and for retention schedules.			
66.	Should allow system administrators to create and maintain organization-specific retention schedules based on the Texas State Library and Archives Commission retention schedules, any additional local schedules (include disposition instructions and specification of file cut off dates) as well as file plans. Respondent should indicate if file plans can contain 1) content of various types (electronic/physical) and/or 2) content that resides in multiple repositories or storage locations. Respondent should indicate if solution supports multiple file plans for a single business unit/department and if file plans can be deployed against organizational units and/or groups.			
67.	Should follow ISO 15489 for classification.			
68.	Should support time and/or event-driven retention periods.			
69.	Should calculate disposition dates for all records and should provide ability to identify records and/or content eligible to be destroyed based on records retention schedules and disposition instructions.			

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B. GENERAL REQUIREMENTS: (Cont.)

Records	Yes	No	With Modifications
70. Should ensure that records on hold cannot be deleted and that a complete audit trail of who created, applied and removed holds is maintained.			
71. Should be able to put records in a hold state while awaiting owner sign-off for final disposition.			
72. Should be able to perform digital shredding for disposed records, deleting records in a manner that they cannot be physically reconstructed or otherwise retrieved including backups.			
73. Should provide ability for a record to be kept of all record destructions (excludes expungements) providing certifiable proof of destruction including the ability to attach a scanned image of a paper destruction record.			
74. Should provide the ability to retain history of changes to disposal authority data.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

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B. GENERAL REQUIREMENTS: (Cont.)

Management	Yes	No	With Modifications
75. Should allow administrators to perform tasks using an easy-to-use web-based client.			
76. Should allow system administrators to add, edit and delete records retention schedules and content disposition instructions.			
77. Should allow administrators to add, modify, and delete user information including assigning, modifying or removing access privileges.			
78. Should allow functions such as import, export, move, delete, status change, etc., and metadata element value updates to be performed on selected single or multiple records and/or content.			
79. Should have the ability to create and capture ad-hoc (custom) reports (automatic template that users can modify and control) utilizing system security settings. The reports should allow the results to be sorted and printed by various fields.			
80. Should provide web-based interface for defining and building reports that utilize simple and/or complex queries reporting across all repositories.			
81. The system should provide extensive administration, data mining, search and statistical reporting functions configurable by Tarrant County.			
82. The system should provide screens and applications to be used by the system administrator to update and maintain the system data items.			
83. Should ensure all reports are uniquely identified, contain processing dates and times and last page or end of reports are clearly identified.			
84. Should provide a standard set of pre-formatted reports that meets commonly requested reports including a disposition report, a hold report, a summary out report and an audit report. Reports should be able to be sent to monitor screen, printer, or disk.			
85. Should render thumbnail previews of images that are imported.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

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B. GENERAL REQUIREMENTS: (Cont.)

Workflow	Yes	No	With Modifications
86. Should provide workflow management capabilities which are integrated within the product.			
87. Should be able to restrict workflows to specific record or content type.			
88. Should be able to set up security classes for approval and viewing of content			
89. Should integrate with the Microsoft Office suite, Task functions and email integration to facilitate the internal workflow.			
90. Should allow assignment of priority to work assignments.			
91. Should allow the assigned user the ability to record completed activities against the work assignment.			
92. Should allow administrators and/or end-users to control and interact with workflow instances: creation, activation, suspension, termination, subject to appropriate authority rights.			
93. Should provide the ability for managers to pull up an "in-progress" type status screen so they can see what workflow is assigned to their area, groups in their area and/or individual employees.			
94. Should provide a notification that alerts the appropriate workflow step owners (internal-users and/or external-users) when they need to perform a task in relation to a particular workflow instance (step action) for a content object. The notification should be capable of specifying the generic and specific workflow and instance name and workflow-launcher details.			
95. Should provide workflow step processes that support sequential actions and parallel actions.			
96. The system should alert supervisors to new submission requests.			
97. Should be able to notify/escalate on overdue workflow actions.			
98. Should report/display/audit user interaction status with workflow steps: Initiated, Active, Inactive, Running, Suspended and Completed/Historical.			
99. The system should alert designated personnel to pending deadlines.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

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B. GENERAL REQUIREMENTS: (Cont.)

Architecture	Yes	No	With Modifications
100. Should provide system-wide customizable error messages.			
101. Should be capable of supporting mirrored sites and provide adequate recovery/rollback/rebuild procedures so that records and content may be recovered or restored following a system malfunction or disaster situation			
102. Should be capable of supporting symmetrical multi-processing.			
103. Should be capable of providing scalability without significant degradation of the system as sites, systems and site usage increases or decreases.			
104. Should be platform independent/hardware agnostic.			
105. Should provide the ability for Tarrant County staff to migrate records and content to new storage media or formats without contractor or consultant intervention in order to avoid loss due to media decay or technology obsolescence.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

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B. GENERAL REQUIREMENTS: (Cont.)

Integration/Interfaces		Yes	No	With Modifications
106.	Should provide connectors/adaptors and a published API (including complete guides and/or manuals) to middleware integration/workflow technologies or provide method where Tarrant County can develop same without contractor involvement. Respondent should provide a list of content repositories and archives that the solution has connectors for including breakdown of pricing if extra charge.			
107.	Should provide ability to copy and/or move objects and containers between repositories.			
108.	Should provide ability to allow integration with applications developed by or for Tarrant County. APIs, SDKs and other software required to integrate must come with complete documentation.			
109.	Should have the ability to import data from a Microsoft SQL Database.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

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B. GENERAL REQUIREMENTS: (Cont.)

Compliance and Security		Yes	No	With Modifications
110.	Should support data exchange involving open standards and protocols for web services (UDDI, SOAP, WSDL, SOA)			
111.	The user interface should be ADA (Americans with Disabilities Act) and W3C (Web Content Accessibility Guidelines) compliant.			
112.	Should have built-in application security as well as data security.			
113.	Should ensure that an end user cannot use the system in any way to identify the presence of records to which they are unauthorized.			
114.	Should be capable of providing a variety of repository security options for separate physical repositories and/or separate logical repositories.			
115.	The system should have a hierarchal security structure. This will allow a progressively narrower access to the functional areas starting with a broad access by the system administrator and narrowing to a much defined access by an end-user application.			
116.	Should calculate and maintain a checksum for records and their metadata or use some similar technological means of detecting any alteration to the record/content and its metadata.			
117.	System processes (workflows) should run as a defined username and associated role.			
118.	User Authentication credentials should be stored in the ECMS referencing Active Directory, should support tokenized authentication, and should be stored in an encrypted form.			
119.	Should provide single sign-on capability. Preference is for this capability to be built into the solution.			
120.	Security rights should be easy to define and maintain.			
121.	Should allow sensitive content to be wiped with specified characters one or multiple times to prevent 'unauthorized viewing' after deletion.			
122.	Should support electronic signatures.			
123.	Should have the ability to set permissions for a set duration of time (i.e. temporary access).			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

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B. GENERAL REQUIREMENTS: (Cont.)

Support and Maintenance		Yes	No	With Modifications
124.	Contractor should be able to prioritize support calls based on severity and respond appropriately within the guaranteed response times: Emergency (Production Down): one (1) hour Urgent (Major Component Disabled/Serious Interruption of Work): Six (6) hours Problem (important but not a serious impediment to activity/customer has work around): twelve (12) hours Routine("How To" questions): forty-eight (48) hours			
125.	Contractor should provide support with hours of availability: Emergency/Hot: 24 hours 7 days a week Operational Hours: 8:00 a.m. to 5:00 p.m. Central Time Weekdays			
126.	Contractor should only accept support calls from an authorized list of Administrators and provide detailed technical support concerning system operations.			
127.	Contractor should provide technical support with professionals available to answer questions, document comments/suggestions and provide technical or administrative information regarding the solution.			
128.	All upgrades, updates, and configurations (and associated documentation changes and user impact statements) required by the ECMS to run on upgraded/updated versions of the ECMS software, the server operating system, the VMware software and/or the SQL software should be provided in a timely manner without additional cost.			
129.	The system should allow for QAS and test environments for the implementation phase as well as for any system updates without additional licensing.			
130.	Support organization should have the ability to provide electronic customer support.			
131.	Vendor should provide a 24 hour/365 day customer care portal to receive, track and manage all customer service issues.			
132.	Any service support contract should provide free bug fixes and product upgrades, as well a preventative maintenance.			
133.	Annual maintenance and support costs will not be incurred until Tarrant County has accepted the system and the system is operating live. This will be referred to as the production sign off.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

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B. GENERAL REQUIREMENTS: (Cont.)

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

Training		Yes	No	With Modifications
134.	Should provide System Administration training for a minimum of six (6) employees that is required for the technical operation of the system including but not limited to routine system maintenance, configuration, security, disaster recovery, etc.			
135.	Should provide System Administration training in the Dallas/Fort Worth Metroplex area and may be at one of our facilities by arrangement.			
136.	Should provide End-User training (in the form of Train-the-Trainer training) for a minimum of ten (10) employees required for the general usage of the system including but not limited to indexing, storage, retrieval, viewing, printing, etc.			
137.	All End-User training should be provided on-site in a facility designated by Tarrant County.			
138.	The respondent should provide an estimated timeframe for conducting training for this type of environment.			
139.	The contractor should prepare and provide how-to guides, quick reference cards and other reference and training materials.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

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SPECIFICATIONS/SCOPE OF WORK

B. GENERAL REQUIREMENTS: (Cont.)

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

User and Software Licenses		Yes	No	With Modifications
140.	The system should have the capacity to support 400 concurrent users, and a minimum of 600 users authorized to access documents utilizing the interfaces between SAP and the Enterprise Content Management solution using generic accounts within SAP.			
141.	As a requirement of the support and maintenance, the contractor should provide software updates at no additional cost.			
142.	The respondent should supply licensing terms and conditions in the Proposed Financial Response.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

SPECIFICATIONS/SCOPE OF WORK

B. GENERAL REQUIREMENTS: (Cont.)

Proposed Project Schedule		Yes	No	With Modifications
143.	The respondent should provide a timeline and milestone schedule for the project including the software configuration, data migration, functionality testing, training and implementation up to the point of acceptance.			
144.	The start of this timeline will begin the date the contract is awarded and should not extend past September 30, 2013.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

SPECIFICATIONS/SCOPE OF WORK

B. GENERAL REQUIREMENTS: (Cont.)

Project Management		Yes	No	With Modifications
145.	Respondents should submit a Project Management Plan (PMP) with the initial proposal. Tarrant County Records Information Management will work with the selected contractor to refine the PMP.			
146.	The contractor should appoint a Project Manager (PM). The contractor's PM should work fulltime throughout the life of the project. The contractor's PM should have authority to make managerial and technical decisions concerning the project. The contractor's PM should serve as the primary point of interface between the contractor and Tarrant County. Communications between the contractor and Tarrant County should be coordinated with the contractor's PM.			
147.	Tarrant County reserves the right to require the contractor to replace the Project Manager at any time. Tarrant County should give the contractor a ten (10) work day notice if it desires to have the PM replaced. Such notice should contain Tarrant County's explanation for PM replacement for the contractor to assess the appropriate action and find a suitable replacement.			
148.	The Project Management Plan using full project life-cycle methodology may be changed only by written agreement by the contractor and Tarrant County. For each change, a Project Change Request form should be prepared.			
149.	Contractor should assist in implementing a Communication Plan (CP). The Communication Plan should be used to guide communication between the contractor and Tarrant County.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

SPECIFICATIONS/SCOPE OF WORK

B. GENERAL REQUIREMENTS: (Cont.)

Implementation Test Strategy and Plan		Yes	No	With Modifications
150.	The respondent should provide a test strategy and plan including test scripts with the proposal. Tarrant County will work with the selected contractor to refine the testing plan.			
151.	The system should support test and QAS environments that are separate from the production environment without additional licensing costs.			
152.	The test strategy should propose in detail the testing approach recommended by the respondent.			
153.	The test plan should detail all the system processes and have a comprehensive test script for each process.			
154.	The test plan should include a stress test to measure the performance of the system and to establish a baseline.			
155.	The contractor should understand that Tarrant County reserves the right to conduct its own test(s) independent of any testing performed by the contractor.			
156.	The contractor should understand that the system acceptance will be determined solely by Tarrant County's testing.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

SPECIFICATIONS/SCOPE OF WORK

B. GENERAL REQUIREMENTS: (Cont.)

Transition and Implementation		Yes	No	With Modifications
157.	The respondent should provide a plan for transitioning from the current system to the proposed system production mode. The plan should include a time line for each step.			
158.	The respondent should provide a detailed implementation plan that describes how the system will be put into production.			
159.	The contractor should assume all operational and specified support responsibility for the life of contract from time of acceptance by Tarrant County until final sign off in production			
160.	The contractor should provide support personnel on site, as appropriate, who have been previously subjected to a background check, to install the system, perform functional and performance testing and assist in the transition to the new system.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

SPECIFICATIONS/SCOPE OF WORK

B. GENERAL REQUIREMENTS: (Cont.)

Inspection and Acceptance		Yes	No	With Modifications
161.	The contractor should notify the Tarrant County Project Manager in writing when the system is ready for the Tarrant County testing and acceptance. This will be done by delivering to the Tarrant County Project Manager a signed Certificate of Acceptance.			
162.	The contractor should understand that using the test plans described within the "Implementation Test Strategy and Plan" section above, Tarrant County will test the system. If Tarrant County identifies deficiencies in the system, the Tarrant County Project Manager will provide the contractor with written notice of the deficiencies. The contractor should correct the deficiencies at no additional charge during a period acceptable to the Information Technology Department. If Tarrant County requires additional time to review the System, Tarrant County's Project Manager should notify the contractor in writing.			
163.	The contractor should understand that if, in Tarrant County's sole opinion, deficiencies continue to exist in the System after the corrective action period, Tarrant County may terminate the contract or negotiate an equitable adjustment.			
164.	The contractor should understand that when Tarrant County is satisfied with the system, Tarrant County's Project Manager will sign the Certificate of Acceptance for the system.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

SPECIFICATIONS/SCOPE OF WORK

B. GENERAL REQUIREMENTS: (Cont.)

Enterprise Content Management		Yes	No	With Modifications
165.	Should provide thorough and robust data mining functionality within web browser as well as against a downloaded file.			
166.	Should provide data mining and extraction capabilities similar to current data mining solution.			
167.	Should be able to capture/archive/import industry standard file formats whether they are stand-alone content or email attachments including but not limited to: MS Office document types (Word®, Excel®, etc.), text, PDF (>PDF/A), JPG, TIFF, audio, video, etc.			
168.	Should be able to automatically identify the format of the content at point of capture. The solution should provide a means for crawling and classifying unstructured/unclassified content.			
169.	Should have the ability to store/view documents in their native formats as long as the format is a de facto standard or non-proprietary format.			
170.	Should allow end-users to register, classify and set disposal authority on electronic non-record content objects.			
171.	Should automatically/manually capture all metadata elements associated w/record and/or content, based on type of record or predefined rules/policy engine.			
172.	Should provide user ability to select default options via drop down list.			
173.	Should provide ability to drag and drop folders with appropriate security credentials.			
174.	Should provide ability to select multiple pages from content and easily drag and drop (or cut and paste) rearranging pages into another location in the content.			
175.	Should have ability to pan, zoom (in/out), and scale an image.			
176.	Should provide ability to capture email heading metadata, content, and attachment(s) as a single record.			
177.	Should be able to amend or append to previously scanned documents without rescanning the entire document or modifying original metadata.			
178.	Should capture/archive/import single and multiple items simultaneously.			
179.	Should be able to create, modify, import and export metadata elements and values, without contractor assistance, using CSV or XML			
180.	Should be able to ensure that all captured metadata remains linked to appropriate records and is unchanged throughout the useful life of the records including after migration to new media or technology.			
181.	Should support multiple metadata schemas simultaneously for a content object.			
182.	Should follow ISO 15836 (Dublin Core Metadata Element Set).			
183.	Should be able to append new metadata to any element without altering the original metadata.			
184.	Should be able to create/modify and import/export taxonomy elements and values, without contractor assistance, using CSV or XML. Should allow multiple levels and can be used to define default or mandatory metadata for a record. Titles should go at least 2 levels deep with free text to assist. Taxonomy terms should be unique across all levels.			

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

SPECIFICATIONS/SCOPE OF WORK

B. GENERAL REQUIREMENTS: (Cont.)

Enterprise Content Management		Yes	No	With Modifications
185.	Should be able to control thesaurus depth and view, update and propagate changes.			
186.	Should accommodate multi-level taxonomies.			
187.	Should have the ability to manage records and/or content in place as well as archive to repository based on needs.			
188.	Should assign unique identifiers to records and/or content and their associated metadata.			
189.	Should have versioning and should provide, maintain and manage version history and version control for all content (including thesaurus, taxonomy and pick lists) in all environments (development, test, QAS, stage, production, etc.).			
190.	Should permit real-time redaction of critical information based on security without altering the original content.			
191.	Should provide a means of tagging content and sending emails and attachments to or from the system repository with the ability to specify down to a portion of the page or record.			
192.	Should be able to manage versions of individual content objects and to force a new version on edit of content and/or metadata.			
193.	Should provide the ability to support multiple renditions of a content object (i.e.: word, pdf, html, xml)			
194.	Should provide the ability to enclose content objects in containers according to a configurable hierarchy (e.g.: documents within files, versions within documents, web pages, and websites).			
195.	Should provide the ability to manage and maintain the integrity of content objects containing embedded and linked content objects. (e.g. maintain dynamic links to content objects).			
196.	Should provide the ability to support relationships over different repositories/domains/content collections within security groups and conceal relationships from users without appropriate rights to the related content object.			
197.	Should provide the ability to navigate (through quick select buttons or forward/back arrow) between different levels of the hierarchical relationship in both directions, allowing efficient return to point of origin.			
198.	Should provide enterprise indexing to easily locate any content throughout the existing County computer enterprise and provide server transparency.			
199.	Compression capabilities should default to "Off".			
200.	Should provide a means for mapping content and metadata to and from external systems.			
201.	Should be able to out-of-the box archive content directly from their native program by way of either a control key or pop up function on the users' systems (i.e. Outlook®, Word®, or Excel® content. Office 2007 and greater) incorporating and exchanging data with these programs. Archiving of emails should include attachments.			
202.	Should have ability to grant or withhold specific permissions based on type of record and/or content down to part of a page or record.			

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

SPECIFICATIONS/SCOPE OF WORK

B. GENERAL REQUIREMENTS: (Cont.)

Enterprise Content Management		Yes	No	With Modifications
203.	Should be capable of scaling up to 20,000 content management users			
204.	Should be capable of handling up to 15,000 external Web users			
205.	The system should be able to support a server inside the Tarrant County firewall and application authentication for outside entities..			
206.	Should be able to use exports from Digitech System's PaperFlow product to link metadata indexing to images.			
207.	Should support the ability to apply watermarks to printed or downloaded content.			
208.	Should provide for the option of a separate data store.			
209.	Should be able to publish content to a separate web server.			
210.	Respondent should indicate if the solution integrates with network file shares.			
211.	Should be capable of integrating with ESRI ArcGIS and all updates to this.			
212.	Should be capable of integrating with SharePoint® (DOD 5015.2 certified) and all updates to this.			
213.	Should provide the ability for administrators and/or authorized users to distribute content on royalty-free DVDs or portable hard drives.			
214.	Should provide the ability to work with copier-scanners, fax-copier-scanners, and digital cameras.			
215.	Should allow users to make annotations to records without altering the records.			

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
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SPECIFICATIONS/SCOPE OF WORK

B. GENERAL REQUIREMENTS: (Cont.)

Records Center Management		Yes	No	With Modifications
216.	Should provide the ability for system administrators to select types of barcode formats supported by the system including 3 of 9.			
217.	Should provide the ability to support and upload data from light weight bar-code wands and portable walk-around scanners.			
218.	Should provide the ability to design container labels including the ability to insert and size barcodes. These labels should be able to hold complex data for a number of boxes (e.g. department, start and ending range, shelf location and related consignment data).			
219.	Should provide the ability for end users to print box labels including barcode at the user's location. Automatic notification upon printing labels sent to Records Center staff requesting pick up of these new boxes is <i>desired</i> .			
220.	Should provide the ability for power users to update field and other fields on containers (excluding location details).			
221.	Should provide the ability for power users to delete new empty containers.			
222.	Should provide the ability to track hardcopy objects (e.g.: folders, files, boxes, other physical items).			
223.	Should provide the ability to maintain a specified number (number is to be configurable by Tarrant County administrators without assistance from the contractor) of movement histories against each tracked object.			
224.	Should provide the ability to send notification of object movement (e.g.: in-transit, received).			
225.	Should have the ability for departmental users to select items from their "Request List" to create a printable "Return List".			
226.	Should not allow users to request/check out records that are already checked out.			
227.	Should have the ability to link a file to a container to facilitate scanning and attachment of a 'contents' sheet for that container. This file should be viewable by the Records Center staff as well as the user/owner.			
228.	Should provide the ability for users to reserve hardcopy records in advance and notify Records Center staff.			
229.	Should ensure that only Records Center staff and administrators can change location information.			
230.	Should provide a means of allowing physical records to be returned to storage.			
231.	Should provide the ability to maintain separate location directories for physical locations external/internal to the records center and restrict the use/update of locations to nominated users or groups of users.			
232.	Should provide the ability to manage workflow: Should provide workflow for containers (e.g.: request for storage, arrival of storage, shelving of container, etc.). Should provide workflow for disposal of containers and/or records (e.g.: approve disposal and/or set disposal authority for future notification, etc.).			

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

SPECIFICATIONS/SCOPE OF WORK

B. GENERAL REQUIREMENTS: (Cont.)

Records Center Management		Yes	No	With Modifications
233.	Should provide the ability to expunge individual folders (i.e. content) within the container.			
234.	Should provide the ability for records within a container to inherit/disinherit location information from the container location.			
235.	Should provide the ability for hardcopy objects that are linked to electronic objects to be moved/tracked with a workflow.			
236.	Should provide a means of auditing missing/lost records.			
237.	Should provide the ability to enter volume metrics per storage unit and box type and then calculate shelf-space.			
238.	Should provide Tarrant County staff the ability to design storage repository (e.g.: number of shelves and index to shelves, in a graphical workspace) including configurations to accommodate the current and future shelf matrix.			
239.	Should provide the ability to distinguish electronic versus hardcopy content and to generate reports for electronic, hardcopy or both.			
240.	Should provide the ability to distinguish electronic disposal trigger (object 'time-expired') from actual disposal (i.e.: physical removal of boxes from shelves).			
241.	Should provide the ability to re-box and/or rearrange contents between containers.			
242.	Should provide a "chain of custody" history for all containers.			
243.	The system should alert users when they have a record checked out past the check out period.			
244.	Should have ability to grant or withhold specific permissions based on type of records down to individual containers.			
245.	Should provide reports on space assigned and growth trends.			
246.	Should report required shelf space, available shelf space, and/or available by department shelf space.			
247.	Should provide the ability for Records Center staff to update record location via scanned bar-code data upload or manual selection of location data from a directory.			
248.	Respondent should indicate whether or not solution supports the use of RFID.			
249.	Should have the ability to "restore" destroyed container information in case of return or accidental "destruction" within the database.			
250.	Should check that record requested is within the range (within the start and end range fields) for the container specified rejecting request if it is not.			
251.	Should have the ability to notify Records Center staff that multiple requests come from the same container.			
252.	Should allow the addition as well as batch import of content information for containers.			

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

SPECIFICATIONS/SCOPE OF WORK

B. GENERAL REQUIREMENTS: (Cont.)

Does your proposed solution meet or exceed all the requirements listed above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is preferred.

In addition to the requirements stated above, please detail any other capabilities and functions that may be of interest to Tarrant County.

RFP FOR COMPREHENSIVE ENTERPRISE CONTENT MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES

XI. RESPONDENT QUALIFICATIONS:

A. General Requirements:

1. Tarrant County is seeking an experienced provider of Enterprise Content Management Software for the Records Management Department. A Respondent is any individual, organization or team eligible to respond to this RFP. A Respondent's response will be called a Proposal. A firm responding to this RFP will be referred to as a Respondent. A Respondent selected to provide the services described in this RFP will be referred to as the Contractor.
2. The responses will be evaluated in accordance with predetermined criteria, with clarifications and best and final offers, as the County deems necessary.
3. All Respondents are advised to begin preparation of their responses immediately, as the requirements of this RFP are complex and must be responded to carefully.
4. The Respondent must demonstrate to the sole satisfaction of the County that the Respondent can successfully deliver services of the type and scope set forth in this RFP. The Respondent should provide a résumé for each proposed Project Team member that clearly demonstrates technical and subject matter expertise required by this RFP.

B. Software Source Code Escrow:

1. The contractor, at no additional costs to Tarrant County shall place the entire set of source code for the proposed software solution with an authorized escrow agent. Setting aside the software in an escrow account provides the County a method of obtaining the source code in the event the contractor ceases to market and support the proposed software. The contractor shall provide all information to Tarrant County relevant to placing the software with an authorized escrow agent, ensuring the most recent version of the software is in escrow.

XII. CONTRACT REQUIREMENTS:

- A. The Contract for the proposed system will be deliverable-based using a **fixed fee** pricing model.
- B. The terms and conditions of the Statement of Work and Contract will be fully negotiated.
- C. The contractor should conduct a weekly client review session and provide written status reports that indicate progress against deliverables.
- D. The financial proposal must include all costs as indicated in the Proposed Financial Response form (Pages 63–65).
- E. Tarrant County expects the contract to begin May 1, 2013.

<p style="text-align: center;">RFP FOR COMPREHENSIVE ENTERPRISE CONTENT MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES</p>
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XIII. PROPOSAL SUBMISSIONS:

- A. Proposals should be submitted with the information placed in the following order and divided into sections. All pages should be numbered consecutively.
1. Section 1 – Respondent’s Qualifications and Experience:
 - a. Executive Summary – This section should be limited to a brief narrative highlighting the company’s background and experience. Narrative should clearly demonstrate compliance with vendor qualifications listed in the RFP specifications. Include length of time the company has been in business and provide examples of past projects. Include a list of current and/or pending installations, including number of licensed users.
 2. Section 2 – Project Approach and Management:
 - a. This section should contain a brief description of how the Respondent proposes to successfully manage this project.
 - b. Project Team – The Respondent should include a description of how the project team will be structured, its roles and responsibilities, location within the company’s organizational framework and chain of command. Brief two (2) page résumés of the Respondent’s staff assigned to this project along with their assignment are to be included in this section. Since Respondent’s staff experience and knowledge are a vital component of project success, Tarrant County expects and requires that résumés submitted are for staff actually assigned to the project.
 - c. Project Plan – Respondent should provide a preliminary Project Management and Communication Plan including implementation, test strategy, transition, training, inspection and acceptance plans. Include a preliminary Statement of Work that describes products to be delivered and the work to be performed by the Respondent during this engagement and a detailed timeline and milestone schedule.
 - d. Impact on Information Technology Department – Performance of this Enterprise Content Management project cannot be completed without consultation with Tarrant County IT Departments. At the very least, this will include Communications, Database, Security, Server Group and Enterprise Support. An estimate should be provided of the time that will be required with each IT department.

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3. Section 3 – Technical Response:

- a. This section should set forth the proposed technical solution in response to this RFP. The Respondent must demonstrate to the sole satisfaction of Tarrant County that the Respondent can successfully deliver services of the type and scope set forth in this RFP. Include in this section responses to the Systems Requirements Checklist.
- b. Project Solution – This section should contain a narrative that clearly demonstrates the Respondent's approach toward meeting the goals and objectives of this RFP. This section should address how each specific requirement of the RFP will be met by the proposed solution. Further, any desirable features of this approach should also be explained. Clarity of description of the proposed solution is the aim and, therefore, use of product boilerplate and marketing releases throughout this section is discouraged.
- c. **Software and Hardware Requirements – Respondent should provide detailed software and hardware requirements to implement the system. Include specifications for all hardware required to implement the system. DO NOT INCLUDE COSTS FOR HARDWARE. Tarrant County will provide support and maintenance for all hardware.**
- d. On-going Support and Maintenance – Respondent should include a detailed proposal outlining the ongoing support and maintenance offered over the five (5) year contact term.

4. Section 4 – References:

- a. Submit three (3) vendor references, other than Tarrant County, who can verify your performance as a vendor. Submit references on Vendor Reference Form provided in RFP specification packet.
- b. Include any material (including letters of support) indicating current capabilities and past performance in meeting implementation deadlines.

5. Section 5 – Respondent's Contract:

- a. Respondents are to include one (1) original of any or all vendor-required contracts (i.e., purchase contract, lease/purchase contract, maintenance contract, software license contract, etc.) in their proposal response. Respondent should ensure that ALL applicable contracts are included with their bid response, and that ONLY applicable contracts are included. Failure to provide contracts as instructed or to cause an unnecessary and untimely delay in getting contracts reviewed and signed may result in the rejection of the proposal.

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- b. During the evaluation process (and prior to making an award recommendation), the Respondent(s) who appear successful in their proposal will have their contracts subjected to review by Tarrant County's District Attorney's Office.
 - c. Following this review, the Respondent should incorporate any necessary changes or addenda into the contracts and quickly provide four (4) signed originals to Tarrant County for the County Judge to sign in the Commissioners Court when a contract award is made. Once award has been made, and the County Judge has signed the contracts, one (1) complete set will be returned to the Respondent by Tarrant County.
 - d. **Failure of the Respondent to provide ALL applicable contracts in a timely and orderly manner may jeopardize award recommendation.**
6. Section 6 – Required Forms:
- a. Proposal Signature Form, with signature.
 - b. Certification of Eligibility, with signature.
 - c. Addendum Cover page, with signature (if applicable).
 - d. Deficiencies and Deviations Form.
 - e. Insurance Certificates.
 - f. Form for Disadvantaged Business Enterprises (if applicable).
 - g. HUB Certifications (if applicable).
 - h. Subcontractor Forms (if applicable).
 - i. Systems Requirements Check list (submit in Section 3).
7. Section 7 – Cost Proposal:
- a. The Proposed Financial Response form (Pages 63–65) should be placed in a separate, sealed envelope and clearly marked with the respondent's name and RFP number. Sealed envelope with cost proposal should be included in envelope/box with proposals for shipping.
 - b. The Proposed Financial Response form must set forth all costs associated with the proposed response to this RFP. Any contract signed will be a fixed cost contract and no other costs will be allowed for performance of proposed solution.
 - c. Include first year annual system maintenance fees, license fees and other costs, and projected maintenance costs for four (4) years.
 - d. Include a payment schedule based on the milestone schedule.

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XIV. PROPOSAL EVALUATION AND AWARD:

A. Approach:

1. The Tarrant County Purchasing Department will guide the evaluation of the responses received. An Evaluation Committee will be established to evaluate and score the submitted Proposals. The Evaluation Committee may consist of representatives from various County Departments.
2. The County reserves the right at its sole determination to include additional Department(s), Employee(s), or Contractor(s) in the evaluation of proposals, as the County deems necessary.
3. The County reserves the right at its sole discretion to determine the process for proposal evaluation and may elect to accelerate the evaluation process by combining or eliminating evaluation phases, if it is deemed in the public interest to do so.

B. Evaluation Criteria:

1. The following criteria will be used to determine the ranking of the proposals:
 - a. Project approach and management: 0 – 20 points
 - i. Ability to provide an Enterprise Content Management System project ending September 30, 2013.
 - ii. Timeline and milestone schedules.
 - iii. Proposed mechanism for legacy data migration and test environment.
 - iv. Proposed training and system support.
 - v. Qualifications and experience of proposed team.
 - b. Cost: 0 – 30 points
 - i. Cost of system/services.
 - c. Company background/history: 0 – 20 points
 - i. Length of time in business, including the length of time the company has been providing Enterprise Content Management Systems.

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B. Evaluation Criteria: (Cont.)

- c. Company background/history:
 - ii. Listing of current/pending installations, including the number of licensed users.
 - iii. Any material (including letters of support) indicating current capabilities and past performance in meeting implementation deadlines.
 - iv. Response of References.
 - d. Proposed System and Technical Solution: 0 – 30 points
 - i. Proposed solution meets or exceeds the core and general requirements of the RFP.
 - ii. Proposed solution fits the business needs of the Tarrant County Records Management Department.
 - iii. Comprehensiveness and organization of proposal.
 - iv. Understanding of the project.
 - v. Proposed technical solution is compatible with Tarrant County Information Technology existing systems.
- Total: 100 Points

C. Evaluation of Cost Proposal:

1. Responses will be evaluated separately to score the Cost Proposal using the following formula:

$$(\text{Lowest Cost Proposal} / \text{Respondent Cost Proposal}) \times 30.$$

Maximum Cost Proposal Points: 30 points.

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D. Product Demonstration:

1. The Respondents with highest initial scores may be invited to provide a demonstration of proposed system to the Evaluation Committee. Demonstrations will be in person and last no longer than two (2) hours. A script will be provided and may include the following:
 - a. Demonstrate the process of requesting multiple files from the Records Center from the perspective of the end user.
 - b. Demonstrate the notification process when requests for files have been received at the Records Center.
 - c. Create a daily report log for the Records Center displaying the number of requests for a chosen/specific day.
 - d. Demonstrate the process of checking records back into the Records Center.
 - e. Demonstrate the ability to separate and secure records by user login, and display log files that record unauthorized access.
 - f. Demonstrate the process of adding a new user and adding a new record/content type.
 - g. Demonstrate the process of modifying an existing index and existing metadata.
 - h. Demonstrate searching using and/or and search within a search.
 - i. Demonstrate the creation and/or modification of the customizable user interface.
 - j. Demonstrate updating indexing information on multiple records.
2. Scoring of the demonstrations will be based on the same criteria used for the initial ranking. The demonstration score for these Respondents will override the initial ranking score.
3. Tarrant County reserves the right at its sole discretion to determine if oral presentation(s) are in the best interest of the County. Tarrant County is under no obligation to request demonstrations.



TARRANT COUNTY

HISTORICALLY UNDERUTILIZED BUSINESSES (HUB) POLICY

I. POLICY STATEMENT

The Tarrant County Commissioners Court, being the policy development and budgetary control unit of county government, will strive to ensure that all businesses, regardless of size, economic, social or ethnic status have an equal opportunity to participate in the County's procurement processes. The County is committed to promote full and equal business opportunity for all businesses to supply the goods and services needed to support the mission and operations of county government, and seeks to encourage the use of certified historically underutilized businesses (HUBs) through the use of race, ethnic and gender neutral means. It is the policy of Tarrant County to involve certified HUBs to the greatest extent feasible in the County's procurement of goods, equipment, services and construction projects while maintaining competition and quality of work standards. The County affirms the good faith efforts of firms who recognize and practice similar business standards.

II. DEFINITIONS

Historically underutilized businesses (HUBs), also know as a disadvantaged business enterprise (DBE), are generally business enterprises at least 51% of which is owned and the management and daily business operations are controlled by one or more persons who is/are socially and economically disadvantaged because of his or her identification as a member of certain groups, including women, Black Americans, Mexican Americans and other Americans of Hispanic origin, Asian Americans and American Indians.

Certified HUBs includes business enterprises that meet the definition of a HUB and who meet the certification requirements of certification agencies recognized by Tarrant County.

Businesses include firms, corporations, sole proprietorships, vendors, suppliers, contractors, subcontractors, professionals and other similar references when referring to a business that provides goods and/or services regardless of the commodity category.

Statutory bid limit refers to the Texas Local Government Code provision that requires competitive bidding for many items valued at greater than \$50,000.

III. POLICY GUIDELINES

- A. Tarrant County, its contractors, their subcontractors and suppliers, as well as all vendors of goods, equipment and services, shall not discriminate on the basis of race, color, creed, gender, age, religion, national origin, citizenship, mental or physical disability, veteran's status or political affiliation in the award and/or performance of contracts. All entities doing business or anticipating doing business with the County shall support, encourage and implement affirmative steps toward a common goal of establishing equal opportunity for all citizens and businesses of the county.
- B. Tarrant County will use and recognize the State of Texas certification process in conjunction with the implementation of this policy. The County may recognize other agencies' certification processes recognized by the State of Texas. Tarrant County reserves the right to review the certification status of any vendor applying to do business with the County. This review will be accomplished to determine the validity and authenticity of the vendor's certification as a HUB.
- C. The Commissioners Court may establish HUB target goals. Through a systematic approach of soliciting quotes, bids and proposals from certified HUBs and in compliance with applicable state and federal law this policy will strive to meet those goals.
 1. Target goals should consider:
 - the availability of HUB firms within the specific category of goods or services to be procured; and
 - the diversity of the county's population.
 2. The goals should be reviewed and amended periodically.
 3. The program may apply to all County procurements including construction and professional services.
 4. Particular attention will be given to HUB participation on purchases in excess of the statutory bid limit.
 5. The Commissioners Court herein establishes a 20% good faith target goal for Tarrant County.

- D. Tarrant County will actively seek and encourage HUBs to participate in all facets of the procurement process by:
1. Continuing to increase and monitor a database of certified HUB vendors, professionals and contractors. The database will be expanded to include products, areas of expertise and capabilities of each HUB firm.
 2. Continuing to seek new communication links with HUB vendors, professionals and contactors to involve them in the procurement process.
 3. Continuing to advertise bids on the County's website and in newspapers including newspapers that target socially and economically disadvantaged communities.
 4. Continuing to provide copies of bid specifications to minority Chambers of Commerce.
- E. As prescribed by law, the purchase of one or more items costing in excess of the statutory bid limit must comply with the competitive bid process. Where possible, those bids will be structured to include and encourage the participation of HUB firms in the procurement process by:
1. Division of proposed requisitions into reasonable lots in keeping with industry standards and competitive bid requirements.
 2. Where feasible, assessment of bond and insurance requirements and the designing of such requirements to reasonably permit more than one business to perform the work.
 3. Specification of reasonable, realistic delivery schedules consistent with the County's actual requirements.
 4. Specifications, terms and conditions reflecting the County's actual requirements are clearly stated, and do not impose unreasonable or unnecessary contract requirements.
- F. A HUB Policy statement shall be included in all specifications. The County will consider the bidder's responsiveness to the HUB Policy in the evaluation of bids and proposals. Failure to demonstrate a good faith effort to comply with the County's HUB policy may result in a bid or proposal being considered non-responsive to specifications.
- G. The Purchasing Department will actively seek the participation of HUB firms in the quotation process for purchases under the statutory bid limit. HUB firms will be identified on the computerized database and linked to the commodities they represent. Buyers will be encouraged to use available internal and external databases of certified HUB firms.

- H. Nothing in this policy shall be construed to require the County to award a contract other than to the lowest responsive bidder as required by law. This policy is narrowly tailored in accordance with applicable law.

IV. ADMINISTRATIVE GUIDELINES

- A. The Purchasing Department shall serve as the County's HUB Office with responsibility for the implementation, monitoring and general operations of the HUB policy. The Purchasing Agent shall serve as the County HUB Officer.
 - 1. The HUB Officer will establish procedures to implement this policy across the full spectrum of the procurement process. The County HUB Office will periodically review with department head and elected officials regarding procurement opportunities.
 - 2. Managing the policy and training buyers and other County personnel in order to meet County goals will be the responsibility of the HUB Office.
 - 3. The HUB Office will cooperate with other local government entities to increase HUB participation throughout the county and region. The HUB Office is encouraged to participate in educational and other outreach programs to assist HUB firms.
 - 4. The HUB Officer will receive and review complaints and recommendations regarding the implementation of the HUB Policy and the good faith efforts of bidders. Further, the HUB Office will audit for compliance to the HUB Policy on eligible projects after award, during the performance of the contract and after completion, while also making any recommendations to Commissioners Court regarding any irregularities or misrepresentation of facts as they relate to compliance with the policy. The HUB Office will review documentation submitted by HUB firms in compliance with this policy.
 - 5. An annual report along with recommendations shall be provided to the Commissioners Court and Purchasing Board. The annual report will provide statistical data and efforts reflected in the number of purchase orders, value of goods and services purchased, percentages to HUB firms, and outreach and marketing efforts. Other statistics may be required or requested by the Commissioners Court or Purchasing Board.

510 Historically Underutilized Businesses Policy

Adopted: Court Order 64788 (December 17, 1990)

Amended: Court Order 69958 (December 7, 1993)

Amended: Court Order 99651 (December 28, 2006)

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

FOR DISADVANTAGED BUSINESS ENTERPRISES ONLY

Disadvantaged Business Enterprises (DBE) are encouraged to participate in Tarrant County's bid process. The Purchasing Department will provide additional clarification of specifications, assistance with Bid Proposal Forms, and further explanation of bidding procedures to those DBEs who request it.

Representatives from DBE companies should identify themselves as such and submit a copy of the Certification.

The County recognizes the certifications of both the State of Texas General Services Commission HUB Program and the North Central Texas Regional Certification Agency. All companies seeking information concerning DBE certification are urged to contact.

Texas Procurement and Support Services
Statewide HUB Program
1711 Jacinto Blvd.
PO Box 13047
Austin, TX 78711-3047
(512) 463-5872

OR

North Central Texas
Regional Certification Agency
624 Six Flags Drive, Suite 100
Arlington, TX 76011
(817) 640-0606

If your company is already certified, attach a copy of your certification to this form and return with proposal.

COMPANY NAME: _____

REPRESENTATIVE: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

TELEPHONE NO. _____ FAX NO. _____

Indicate all that apply:

- _____ Minority-Owned Business Enterprise
- _____ Women-Owned Business Enterprise
- _____ Disadvantaged Business Enterprise

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

VENDOR REFERENCES

Please list three (3) references, **other than Tarrant County**, who can verify your performance as a vendor. Performance includes but shall not be limited to, sales and/or service, delivery, invoicing, and other items as may be required for Tarrant County to determine your firm's ability to provide the intended goods or service of this RFP. The County prefers references to be from customers for whom your firm has provided the same items (sales and/or services) as those specified in this RFP. Inaccurate, obsolete or negative responses from the listed references could result in rejection of your proposal.

REFERENCE ONE

GOVERNMENT/COMPANY NAME: _____
LOCATION: _____
CONTACT PERSON AND TITLE: _____
TELEPHONE NUMBER: _____
EMAIL: _____
SCOPE OF WORK: _____
CONTRACT PERIOD: _____

REFERENCE TWO

GOVERNMENT/COMPANY NAME: _____
LOCATION: _____
CONTACT PERSON AND TITLE: _____
TELEPHONE NUMBER: _____
EMAIL: _____
SCOPE OF WORK: _____
CONTRACT PERIOD: _____

REFERENCE THREE

GOVERNMENT/COMPANY NAME: _____
LOCATION: _____
CONTACT PERSON AND TITLE: _____
TELEPHONE NUMBER: _____
EMAIL: _____
SCOPE OF WORK: _____
CONTRACT PERIOD: _____

THE ORIGINAL AND TWELVE (12) COPIES OF THIS FORM MUST BE RETURNED WITH PROPOSAL!

RFP FOR COMPREHENSIVE ENTERPRISE CONTENT MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES

PROPOSAL SIGNATURE FORM

The undersigned agrees this proposal becomes the property of Tarrant County after the official opening.

The undersigned affirms he has familiarized himself with the local conditions under which the work is to be performed; satisfied himself of the conditions of delivery, handling and a storage of equipment and all other matters which may be incidental to the work, before submitting a proposal.

The undersigned agrees if this proposal is accepted, to furnish any and all items/services upon which prices are offered, at the price(s) and upon the terms and conditions contained in the Specifications. The period for acceptance of this Proposal will be one hundred twenty (120) calendar days unless a different period is noted by the proposer/respondent.

The undersigned affirms that they are duly authorized to execute this contract, that this proposal has not been prepared in collusion with any other Proposer/Respondent, nor any employee of Tarrant County, and that the contents of this proposal have not been communicated to any other proposer/respondent or to any employee of Tarrant County prior to the official opening of this RFP.

Vendor hereby assigns to purchaser any and all claims for overcharges associated with this contract which arise under the antitrust laws of the United States, 15 USCA Section 1 et seq., and which arise under the antitrust laws of the State of Texas, Tex. Bus. & Com. Code, Section 15.01, et seq.

The undersigned affirms that they have read and do understand the specifications and any attachments contained in this RFP package. **Failure to sign and return this form will result in the rejection of the entire proposal.**

NAME AND ADDRESS OF COMPANY:

 Tel. No. _____
 E-Mail Address: _____

AUTHORIZED REPRESENTATIVE:

Signature _____
 Date _____
 Name _____
 Title _____
 FAX No. _____

AFTER HOURS EMERGENCY CONTACT:

Name: _____ Tel. No. _____

COMPANY IS:

Business included in a Corporate Income Tax Return? _____ YES _____ NO
 _____ Corporation organized & existing under the laws of the State of _____
 _____ Partnership consisting of _____
 _____ Individual trading as _____
 _____ Principal offices are in the city of _____

THIS FORM MUST BE SIGNED AND THE ORIGINAL AND TWELVE (12) COPIES RETURNED WITH PROPOSAL!

**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

CERTIFICATION OF ELIGIBILITY

By submitting a bid or proposal in response to this solicitation, the bidder/proposer certifies that at the time of submission, he/she is not on the Federal Government's list of suspended, ineligible, or debarred contractors.

In the event of placement on the list between the time of bid/proposal submission and time of award, the bidder/proposer will notify the Tarrant County Purchasing Agent. Failure to do so may result in terminating this contract for default.

Authorized Signature

**THIS FORM MUST BE SIGNED AND THE ORIGINAL AND TWELVE (12) COPIES
RETURNED WITH PROPOSAL!**

RFP FOR COMPREHENSIVE ENTERPRISE CONTENT MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES

Proposer/Subcontractor Information

An authorized representative of Proposer/Subcontractor who is legally authorized to certify the information requested in the name of and on behalf of the Proposer/Subcontractor is required to complete and sign the Required Certifications. All of the requested information and certifications must be provided in order to be eligible for award. Proposer/Subcontractor's authorized representative must certify as to the truth of the representations made by signing where indicated below.

Proposer/Subcontractor Information	
Name:	
Entity's Legal Form:	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other <hr style="border: 0; border-top: 1px solid black; margin-top: 5px;"/>
Address:	
Designated Contact:	
Phone:	
Fax:	

The undersigned: (1) recognizes that the following representatives are submitted for the express purpose of assisting Tarrant County in making a determination to award a contract and/or approve a subcontract; (2) acknowledges and agrees by submitting the Certification, that the County may at its discretion, by means which it may choose, verify the truth and accuracy of all statements made herein; (3) acknowledges that intentional submission of false or misleading information may constitute a felony; and (4) certifies that the information submitted in this certification and any attached documentation is true, accurate and complete.

Signature of Proposer/Subcontractor

Printed Name

Title

Business Entity

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**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

PROPOSED FINANCIAL RESPONSE

RESPONDENT: _____

INSTRUCTIONS:

The Respondent's price proposal shall be submitted on the following "Price Proposal Schedule". Respondent is requested to fill in the applicable blanks on this form. Additional sheets may be added as applicable.

Pricing must include all costs including but not limited to travel, warranty, integration, maintenance, support, and implementation services provided in the Proposal response.

A. PROPOSED PRICE:

The Proposer shall state its price for providing all minimum and desired services as stated in Scope of Services.

TOTAL PROPOSED PRICE FOR A COUNTY HOSTED CONSOLIDATED ENTERPRISE CONTENT MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES FOR THE INITIAL FIVE (5) YEAR TERM:

\$ _____

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RFP FOR COMPREHENSIVE ENTERPRISE CONTENT MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES

B. BREAKDOWN OF PROPOSED PRICE:

The Proposer shall provide a breakdown of the “Proposed Price” stated in Section A, above, as provided for in the tables below. Items that are not applicable shall be identified as “N/A”; items that are at no charge to the County shall be identified as “N/C”.

DESCRIPTION	PRICE
Software License Fees (for a five (5) year term)	\$
Conversion Services <i>(Please provide detailed cost breakdown and calculations).</i>	\$
Implementation and Project Management Services: <i>(Please provide detailed cost breakdown and calculations).</i>	\$
Other Services <i>(Please provide detailed cost breakdown and calculations).</i>	\$
Training <i>(Please provide detailed cost breakdown on page 65).</i>	\$
Travel <i>(Please provide detailed cost breakdown and calculations).</i>	\$
Additional Costs and Fees <i>(Please list and add additional sheets as necessary).</i>	\$
Maintenance and Technical Support Service Fees (Initial Contract Term)	
Maintenance and Technical Support Service Fees Year 1	N/A – Warranty Period
Maintenance and Technical Support Service Fees Year 2	\$
Maintenance and Technical Support Service Fees Year 3	\$
Maintenance and Technical Support Service Fees Year 4	\$
Maintenance and Technical Support Service Fees Year 5	\$
Total Proposed Price*	\$

**** Note: Total Proposed Price shall be equal to the Proposed Price stated in Section A above.**

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**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

B. BREAKDOWN OF PROPOSED PRICE:

PRICE BREAKDOWN FOR TRAINING			
Position	Anticipated Hours	Proposed Hourly Rate	Total (Hours x Rate)
		\$	\$
		\$	\$
		\$	\$
		\$	\$
Other	Description		
			\$
			\$
Total for Training:			\$

ALTERNATIVE SOFTWARE LICENSE FEE PRICING PROPOSAL:

Tarrant County is requesting alternative software license fee pricing based on annual payments.

SOFTWARE LICENSE YEAR	ANNUAL COST
Year 1	\$
Year 2	\$
Year 3	\$
Year 4	\$
Year 5	\$

THE ORIGINAL AND TWELVE (12) COPIES OF THIS FORM MUST BE RETURNED WITH PROPOSAL!

**ATTACHMENT A
REPOSITORY CONTENT INFORMATION**

**As of September 2012
Electronic Records**



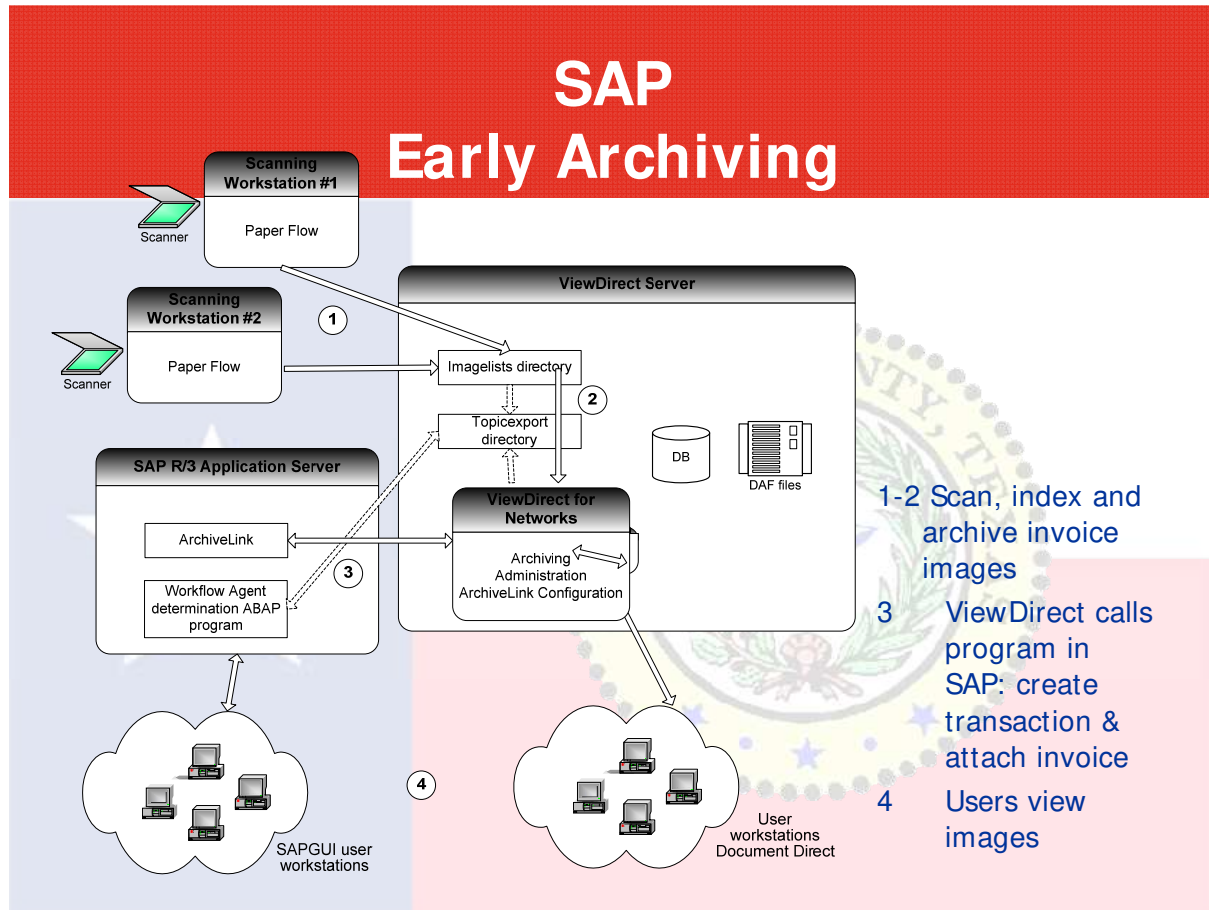
- 3,238 Document Names
- 235 Index IDs
- 1,955,687 DAF (Data Archive Files) Files*
- 2,200 Users
- 1,394 Groups
- ~ 3 TB storage used
- ~ 300 GB annual storage growth

- Original formats:
 - 67% JPEGs
 - 25% TIFFs
 - 5% Text Files
 - Remainder consists of PDFs, PostScript®, Microsoft® Documents, MP3s, HTMLs, etc.

* In some instances, there are multiple images/records per file.

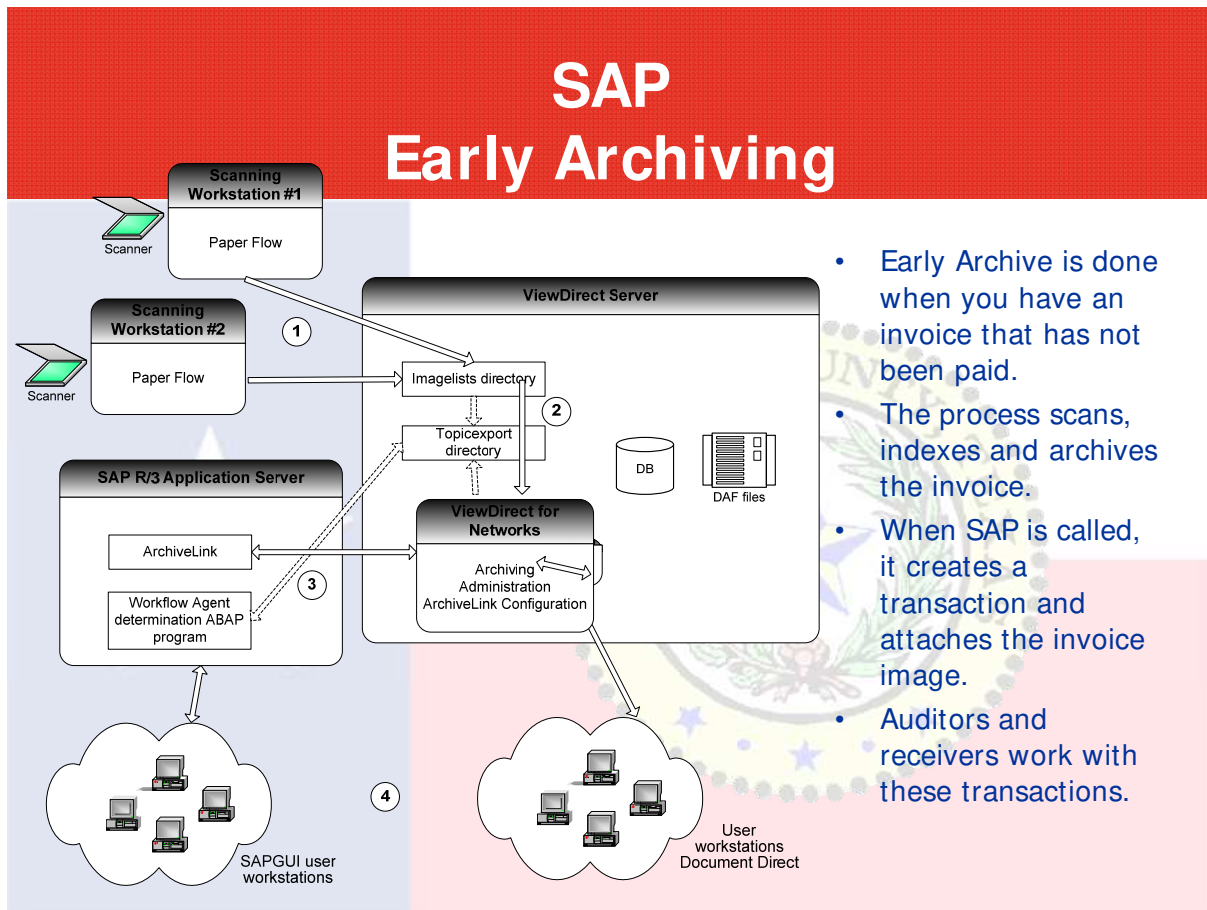
**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

**ATTACHMENT B-1
SAP EARLY ARCHIVING**



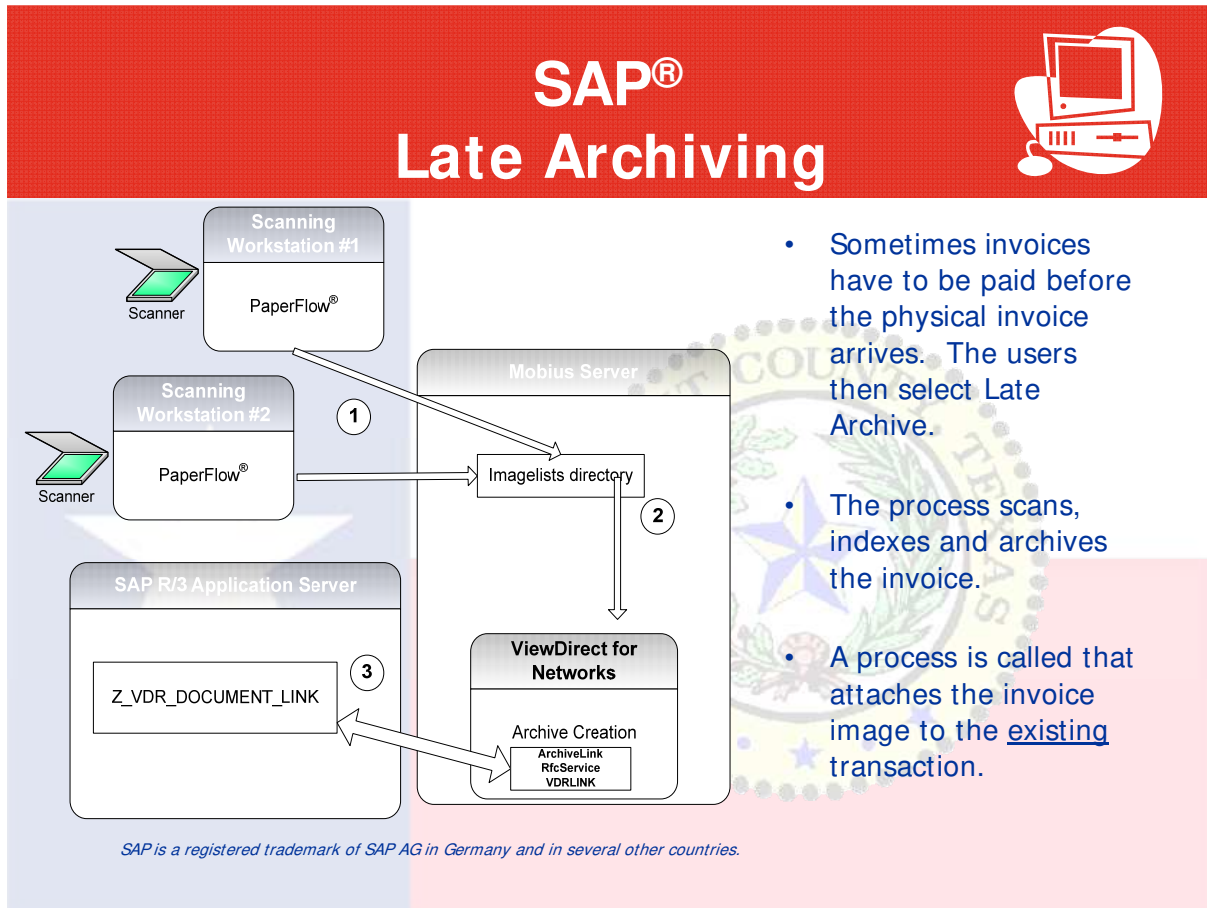
**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

**ATTACHMENT B-2
SAP EARLY ARCHIVING**




- Early Archive is done when you have an invoice that has not been paid.
- The process scans, indexes and archives the invoice.
- When SAP is called, it creates a transaction and attaches the invoice image.
- Auditors and receivers work with these transactions.

ATTACHMENT C SAP LATE ARCHIVING



**ATTACHMENT D-1
ARCHIVING TYPES**

Current Processes
SAP® – From DMS to SAP®



Archive ID	Object Type	Document Class	Document Type	Description
VQ	BKPF	TIF	ZTCF63	Early Archiving
VQ	BKPF	TIF	ZTCF66	Early Archiving
VQ	BKPF	TIF	ZTCFV60	Early Archiving
VQ	BKPF	TIF	ZTCFV65	Early Archiving
VQ	BUS2081	TIF	ZTCMIRO	Early Archiving
VQ	BKPF	TIF	ZTCINVOICE	Late Archive

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**ATTACHMENT D-2
ARCHIVING TYPES**

**Current Processes
SAP® – From SAP® to DMS**

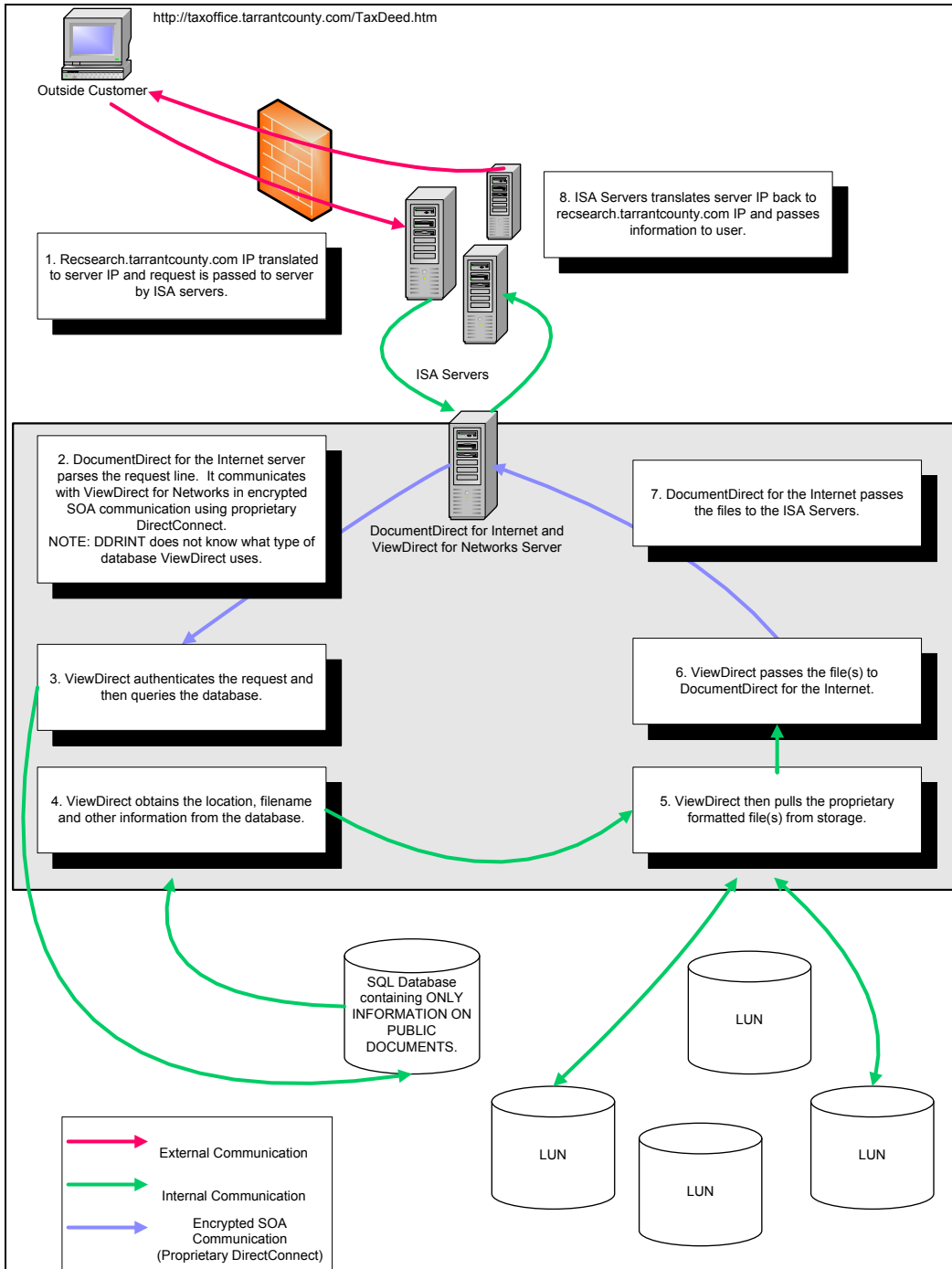


Archive ID	Object Type	Document Class	Document Type	Description
VP	BKPF	PDF	ZTCSIGN	Adobe Forms
VB		HTM	ZEIC_HTMA	ReadSoft
VB		PDF	ZEIC_PDFA	ReadSoft
VC		PDF	ZEIC_PDFI	ReadSoft
VE		PDF	ZEIC_PDFV	ReadSoft
VQ		DOC	ZEIC_DOCA	ReadSoft
VQ		DOCX	ZEIC_DOCX	ReadSoft
VQ		HTM	ZEIC_HTMV	ReadSoft
VQ		PDF	ZEIC_PDF	ReadSoft
VQ		TIF	ZEIC_TIF	ReadSoft
VQ		XLS	ZEIC_XLS	ReadSoft
VQ		XLSX	ZEIC_XLSX	ReadSoft

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**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

**ATTACHMENT E
TAX DEED CARDS DIAGRAM**



**RFP FOR COMPREHENSIVE ENTERPRISE CONTENT
MANAGEMENT SYSTEM AND IMPLEMENTATION SERVICES**

**ATTACHMENT F
SAMPLE LABEL**

<p>Tarrant County</p>	<p>12/1052</p>
<p>Elections</p> <p>M05-7-5-03</p>	 <p>782222</p>
<p><i>Voter Registration Applications and Associated Docs --</i></p>	
<p>Comments: From Scanning Project Trays >> 2211100-2211999, 2212000-2212799, 2212800-2213599, 2213600-2214499, 2214500-2215099, 2215100-2215899</p>	
<p>Start Range: 2211100</p>	
<p>End Range: 2215899</p>	
<p>Start Date:</p>	
<p>End Date:</p>	
<p>Destroy Date: 9/12/2015</p>	

ATTACHMENT G
RECORDS CENTER SOFTWARE INFORMATION

As of September 2012
Hardcopy Records



- 133,340 container entries in database
 - 115,460 Boxes
 - 17,415 Book Volumes
 - 465 Microfilm
- 115 Departments Total – 59 Departments Active
- 400+ Users
- Over 9,600 Requests Made This Year

