Request for Information /Sources Sought

Document Scanning & Management Software

San Joaquin County Office of Education

April 2015

Description: The San Joaquin County Office of Education(SJCOE) is seeking information on available document scanning and management software packages.

Synopsis: SJCOE is exploring options to replace their existing custom document management system with a commercially available system. The contractor shall provide information regarding their represented system(s) and their associated feature sets. Additionally, the contractor must provide preliminary pricing for a possible licensing scenario. The purpose of this synopsis is to evaluate the features and costs of potential systems and whether or not they may be a fit for SJCOE. A solicitation is **not** currently available at this time.

The anticipated contract type is a year-to-year contract for software maintenance and support along with software acquisition and integration costs to be paid in year one. A responding vendor must demonstrate the willingness and capability to provide the service identified in the synopsis and attachments to help the SJCOE determine prospective contractors.

Submissions:

No reimbursement will be made for any costs associated with providing information in response to this synopsis or any follow-up information requests.
Please address each of the following by restating them and providing your response under each one.
1) Company Name:
   Address:
   DUNS:

2) Vendor Point of Contact to include name, telephone number(s), and e-mail address.

3) Address your capabilities to accomplish the service and provide highlights of successful past performance on similar government contracts within the past three years. List the name of the contract customer Point of Contact (POC) name and phone number for past experience.

4) Technical capability statements can be submitted in your own format and shall be 10 pages or less. These statements must include how your system(s) would meet the necessary feature matrix requirements as provided in attachment 1 and the associated descriptions.

NOTE: This is **not** a request for proposal nor is the technical capability statement considered to be a proposal. No reimbursement will be made for any costs associated with providing information in response to this synopsis or any follow-up information requests. The attachments to this Sources Sought are **draft** documents and changes will be made in the future.

Responses are due by 12 p.m., Pacific Standard Time (PST) on 29 May 2015. Please send information via e-mail to Tyler Orick(torick@sjcoe.net). Telephone responses will not be accepted. Responses must come electronically or by mail. All responses will be reviewed upon close of the RFI period.

Response Date: 29 May 2015
Response Due Time: 1200 hours/12:00 PM
Time Zone Due: Pacific Standard Time

Attachments:
>   **Attachment 1:** Feature Matrix (3 Pages)
>   **Attachment 2:** Existing Documents and User Statistics (1 Page)

Contracting Office Location:
>   San Joaquin County Office of Education
>   2901 Arch-Airport Road
>   Stockton CA 95206

Performance Location:
>   San Joaquin County Office of Education
>   2901 Arch-Airport Road
>   Stockton CA 95206

Point of Contact:
>   Name: Tyler Orick
>   Email: torick@sjcoe.net
>   Phone: 209-468-9094

RFI Document Management System Attachment 1: Feature Matrix			
Existing/Required Features			
#	Feature	Required	Desirable	No Opinion
1	Scanning Paper Documents via Existing Scanners	X		
2	Windows based Server Software(must run on Windows Server 2008R2+)	X		
3	Web-Based Read-Only Portal	X		
4	PDF Import	X		
5	Searchable Metadata Fields	X		
6	Scalable(up to 1million+ documents)	X		
7	Single Sign-on	X		
8	Windows 7+ Support for Scanning Software	X		
9	Granular Security for Document Repository	X		
10	Ability to Import Existing Documents & Data	X		
Document Handling Features			
#	Feature	Required	Desirable	No Opinion
11	Archive Documents			X
12	Purge Documents Based on Retention Schedule			X
13	Document Workflow(scan, quality control, approval, etc)		X	
14	Automated File Import(Images, Text etc)		X	
15	Audit Logging	X		
OCR Features			
#	Feature	Required	Desirable	No Opinion
16	Zonal OCR(scan individual fields to avoid keying)			X
17	Full-Text OCR(turns entire document into searchable text)	X		
18	Image Aware Full-Text OCR(Locate a word on a given page image)		X	
Scanning Features			
#	Feature	Required	Desirable	No Opinion
19	Integrate with multi-function devices(Xerox etc)		X	
20	Automated Batch Scanning		X	
21	Macintosh Scanning Client			X
Additional Features			
#	Feature	Required	Desirable	No Opinion
22	Ability to Integrate with 3rd party systems(automated imports)	X		
23	Mobile Client/Responsive Website			X
24	Outlook Document Import for Emails		X	
25	Word/Excel/Project/Powerpoint Plugin for Document Import		X	
26	Centralized Reporting(scheduled, on-demand, ad-hoc)		X	

RFI: Document Management System Attachment 1: Feature Matrix Descriptions

1. **Scanning Paper Documents via Existing Scanners**
   SJCOE currently owns a number of ISIS compatible scanners and will be re-using this existing hardware. Scanners are from major vendors such as Bowe Bell & Howell/Kodak, Fujitsu and Canon.

2. **Windows based Server Software (must run on Windows Server 2008R2+)**
   All server based software components must support a minimum of Microsoft Windows Server 2008R2.

3. **Web-Based Read-Only Portal**
   System must provide web-based read-only access to documents stored in the system. Additional features such as editing and other manipulation are desirable but not required.

4. **PDF Import**
   System must provide the ability to convert PDF documents into searchable documents.

5. **Searchable Metadata Fields**
   Documents must have the ability to be tagged with searchable metadata fields. These fields must be user customizable and editable.

6. **Scalable (up to 1million+ documents)**
   While the current SJCOE system only has approximately two hundred thousand documents we are looking ahead a minimum of 5 years.

7. **Single Sign-on**
   System must support the Single Sign-On capability and be compatible with the Microsoft Active Directory system.

8. **Windows 7+ Support for Scanning Software**
   Any scanning software must support a minimum of Microsoft Windows 7.

9. **Granular Security for Document Repository**
   System must have granular security controls to allow documents for different groups to be isolated by permission. Permissions must be customizable per user/group.

10. **Ability to Import Existing Documents & Data**
    System must have some mechanism to import existing scanned files currently in multi-page TIFF format as well as importing existing metadata stored in Microsoft SQL Server.

11. **Archive Documents**
    Remove a document from general searches but still keep it available for specialized user searches.

12. **Purge Documents Based on Retention Schedule**
    Automatically delete documents based on a user-defined schedule

13. **Document Workflow(scan, quality control, approval, etc)**
    Control the routing of a document to various users who perform different functions such as scanning, quality control, approval etc.

14. **Automated File Import(Images, Text etc)**
    Import additional file types such as standard text, jpeg etc.

15. **Audit Logging**
    Major functions against documents such as scanning, editing, modification and approvals are logged. Log must be viewable in application either by permission or generally available.

16. **Zonal OCR(scan individual fields to avoid keying)**
    Ability of system to look at specific areas/zones of a page and OCR text

17. **Full-Text OCR (turns entire document into searchable text)**
    OCR is performed against the entire document which is turned into searchable text.

18. **Image Aware Full-Text OCR(Locate a word on a given page image)**
    Ability during a full-text search to locate searched words in image

19. **Integrate with multi-function devices (Xerox etc)**
    Integrate with multi-function devices such as Xerox WorkCentre either through a network folder drop location or direct integration with the device.

20. **Automated Batch Scanning**
    Ability to insert separator pages when scanning to automatically create new documents. Additionally there should be support for a network folder drop location where new files will automatically be processed into new documents for later review.

21. **Macintosh Scanning Client**
    Scanning via a Macintosh Client

22. **Ability to Integrate with 3rd party systems(automated imports)**
    Integration capabilities either through a direct API or network folder drop location to allow integration with other 3rd party systems.

23. **Mobile Client/Responsive Website**
    Android/iOS or responsive website for mobile clients

24. **Outlook Document Import for Emails**
    Export emails directly from Microsoft Outlook 2010+ into system based documents.

25. **Word/Excel/Project/PowerPoint Plugin for Document Import**
    Export Microsoft Office 2010+ documents directly into system based documents.

26. **Centralized Reporting (scheduled, on-demand, ad-hoc)**
    Users and Administrators could generate reports regarding documents in the system as needed.

Attachment 2: Existing Documents and User Statistics

Documents:
    Document Count: 203057
    Total Page Count: 4811187
    Repository Size: 512GB

Users:
    Scanning Users: 7
    Total Users(including web-based read-only): 192
    Concurrent Read-Only Users: 15