EDUCATION SERVICE CENTER REGION 19
RFP AWARD SUMMARY

RFP TITLE: Document Scanning, Records Management, and Related Services– ESC Region 19 Allied States Cooperative

RFP NUMBER: 15-7140

RFP OPENING DATE: August 4, 2015

CONTRACT TERM: Date of award until September 30, 2016 with the option to extend in one year increments annually for an additional four (4) years if agreed to by ASC and Vendor
(Extended by Region 19 until September 30, 2017)
(Extended by Region 19 until September 30, 2018)
(Extended by Region 19 until September 30, 2019)
(Extended by Region 19 until September 30, 2020)

FUNDING SOURCE: Various

RFP's ISSUED: 46

RESPONSES: 5

ADVERTISEMENT DATES: Washington Post - June 20, 2015 & June 27, 2015
El Paso Times – June 20, 2015 & June 27, 2015

BOARD MEETING DATE: October 15, 2015

RECOMMENDED FOR AWARD
DataXport.Net, LLC (HUB)
~~**Hyland Software, Inc.**~~ ***as of 7/16/2018**
Professional Document Systems, Inc.
SMARTfiles
Toshiba Business Solutions
_____

TOTAL (estimated) **$750,000.00/ year**

EXPLANATIONS:

Award of this contract will enable ESC Region 19 Cooperative members to utilize the following services; document management, to minimally include archive assessment, preliminary document management, consulting services, and document collection services on site / off site and other technical related support services. All vendors awarded scored an 8 or above out of a possible 10 in evaluation factors.

SPECIFICATIONS PROVIDED BY: Royce Cleveland
ESC Region 19 Allied States Cooperative

EVALUATION COMMITTEE: Royce Cleveland
ESC Region 19 Allied States Cooperative

Martin Camacho
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DataXport.Net, LLC (HUB) *pricelist updated 4/20/2017
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DataXport.Net, LLC offers Document Management Services: Document Scanning / Digital Imaging – one of DataXport's largest service offerings is digital imagining services.

Preliminary Analysis or Archive Assessment (Standard Service) In order for a successful electronic document management implementation to be done, a preliminary analysis of departments, document types and project specifications must be performed. DataXport offers customers guidance on a preliminary analysis and information collection tips to help them define the general scope of work. The cost of these preliminary services is included in the per page scanning price

Comprehensive Document Analysis Consulting Services (Specialized Services) in the event an organization does not have the time or the resources to perform a comprehensive analysis, DataXport is able to provide these services on a consulting basis. Consulting services may be quoted separately and prices will depend on the time effort involved.

Document Collection Services (Standard Service) offers local document collection services. These may be from the customer's location of from any other local facility, such as a warehouse, a long term storage company, a PO Box, etc.

Document Shipping Services (Specialized Services) for out-of-town customers interested in volume digital imaging services to be performed offsite at DataXport's facility, we provide collection and one-way shipping services

Basic Material Preparation (Standard Service) Cost of digital imaging includes basic material preparation, such as: removal of temporary fastening devices, staple and clip removal and file folder removal. In most cases, this type of basic preparation is included in the cost of scanning.

Intensive Material Preparation / Reconstruction (Specialized Service) these services are quoted separately and include, but are not limited to handling dividers or separators, pasting of small items, mending, handling of historical or fragile documents, preservation services, etc.

Scanning Services (Standard Service) include configuration of scanners and selection of resolution settings for optimum output, scanning documents, managing outputs of projects, production metrics, etc.

Basic Indexing Services (Standard Services) includes indexing services of up to 2 index fields with a Page-per-Index ratio no less than 50/2.

Intensive Indexing Services (Specialized Service) this service is offered for extensive indexing requirements where the data entry significantly exceeds the digital imaging services effort; either due to the number of index fields, the Page-per-Index ratio being less than 50/2.
OCR Data Extraction (Standard Service) this service uses custom programming to automate data extraction through an OCR process, avoiding manual data entry.

Basic Image Post-Processing (Standard Service) Basic automatic image enhancement is included. Image enhancement services may be declined prior to conversion for projects requiring a high level of fidelity to source documents.

Full Text OCR Conversion (Specialized Service) Services to convert images to a full text searchable format.

Quality Assurance (Standard Service) QA takes place at every step and all levels of operation, including the receiving area, material preparation, scanning and indexing steps.

Image and Metadata Delivery (Standard Service) DataXport follows customers' specifications for delivery of images and metadata in external hard drives, flash drives (media storage devices quoted separately at current market price; or may also be provided by customer) or by transmission/direct upload to customers' web based system. CDs/DVDs may be also used for delivery of smaller projects

Source Document Disposition - Immediate return after scanning (Standard Services) Utilizing a Delivery Sheet, 20 day temporary storage after project completion prior to approval of destruction, Extended Storage, Certified destruction of documents after approval (Specialized Services). Services quoted separately from scanning, Recycling of non-sensitive/non-confidential documents

Turnaound Time - DataXport meets and often exceeds agreed turnaround times by carefully monitoring and managing productivity, engineering workstation layout, providing preventive maintenance to equipment and offering incentives to operations personnel.

Document Management Services: Conversion
Conversion Services are quoted separately based on project specifications. Services may include:
- microfilm to digital conversion
- microfiche to digital conversion
- COM microfiche to digital conversion
- aperture card to digital conversion
- voice recordings to digital conversion
- video recordings to digital conversion
- Data base import/export or other electronic format conversion services

Electronic Document Management Systems / Enterprise Content Management In the event a customer has the need to implement, enhance or replace a document management system, DataXport offers to customers Digitech Systems, Inc., products. This system (literature with the license based and cloud based systems follows this proposal) has the following functionalities and features, among others:
- License/Hosted Based Solution
- AND, Cloud Based-Saas EDMS/ECM
- Assists with regulatory compliance of HIPAA, FERPA, Sarbanes Oxley Act, Gramm- Leach Bliley Act and other federal regulations
- Includes a Records Retention Module that allows configuring retention periods and destruction locks, among others.
- Multiple security levels: User, project and document levels. Security and integrity features include audit trails, access and flexible privilege and security controls,
- Version controls and check-in/check-out functions.
- Has annotations and comment tools.
- System is SQL Server based
- Sold in modules for affordability and scalability. Modules include (but are not limited to) EDMS/ECM, Capture, Indexing, OCR, E-forms, Workflow, etc.
- Purchase of licenses includes source code to allow for custom programming
- Ready for integrations with multiple business systems
- Able to manage electronic documents in native formats for business continuity (helps avoid obsolescence or over-reliance on proprietary and unsupported files)
- Minimum of a 256-bit AES encryption of documents at rest and when transmitted.

Related Technical Support Service Offered: Per hour charge
Document Imagining Software, Hardware, and Technical Support for In-House Scanning Implementations - In the event a customer has the need to start or improve upon an in-house scanning operation, either for a one-time, point forward or complementary need; DataXport offers software, hardware and our expertise to assist in a cost effective implementation.

Hardware:
- Office/standard size scanning hardware-Kodak (Other brands upon request to include Canon, Fujitsu, Panasonic).
- Large format scanning hardware (Contex)
- Integration and configuration services for existing (compatible) multifunctional/copiers

Additional Services Offered:
- Data entry services or capture services. Prices will be based on project specifications, to be quoted upon request.
- OCR/ICR Processing. Services to be offered in combination with scanning services. Conversion services will be quoted based on project specifications.
- Report Management-COLD management processing services to be quoted upon request.
- Process Automation: Services for process automation will be offered upon request. Prices will be quoted after a preliminary assessment of need is performed.
- DataXport is able to offer other related technical support services as needed.
- DataXport is now a reseller of Kaspersky Endpoint Security software, and can provide Educational/Government pricing.

EMC ApplicationXtender branded software licenses and annual maintenance, all existing, legacy, and future software models and applications (11% discount).

EMC distributor professional services (software service requests outside DataXport's expertise) (9% discount).

Warranty/Guarantee: All products sold by DataXport are new and free from defects unless a customer specifically requests refurbished equipment, or DataXport may propose refurbished equipment if a customer requests a specific model that is no longer in production.

CZUR Book Scanners	Part Number	MSRP	Discount %	R19 Price
CZUR M3000 Pro: Professional book scanner, 32-bit MIPS CPU, scanning speed 60 pages/min, 20 MP HD Sony Camera, 300 DPI and 20 million pixels	CZUR-M3000PRO	$ 4,495.00	10%	$ 4,045.50
CZUR 1 year return to depot service: After initial 1 year warranty period, customer pays freight to ship unit to depot, distributor pays freight to ship replacement unit	CZUR-RTDS	$ 795.00	5%	$ 755.25
CZUR Replacement hand switch	CZUR-SSP1901	$ 40.00	5%	$ 38.00
CZUR Replacement foot pedal	CZUR-SSP1902	$ 64.00	5%	$ 60.80
CZUR replacement power supply	CZUR-SSP1904	$ 64.00	5%	$ 60.80
CZUR replacement pair of finger cots	CZUR-SSP1905	$ 40.00	5%	$ 38.00

*added 11/20/19

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Hyland Software, Inc. *as of 7/16/2018
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OnBase Overview - The OnBase product suite, by Hyland, enables organizations to be more efficient – reducing costs, increasing cash flow, and enabling them to prepare for audits, litigation and disasters

OnBase 15: What's New? OnBase 15 includes more than 3,100 improvements – all of which are designed to improve and enhance your OnBase system and solutions.

The OnBase Cloud - The OnBase Cloud combines the full ECM functionality of OnBase with the flexibility, scalability and cost-benefits of the cloud

Case Management - Use OnBase to model, design, develop and execute collaborative business process and case management solutions – whether dealing with documents, data, or unstructured information and activities

Mobility - With OnBase, it's easier than ever for your information to find you – whether you're on the road, without Internet access or simply working at your desk, mobile content management keeps your processes running.

Enterprise Scalability - Whether you're deploying it around a specific case, department or your entire enterprise, OnBase scales to meet your needs

Data Capture - As documents are captured, OnBase pulls the relevant data off the page and then shares it with your other systems, saving you time and allowing your employees to focus on higher value tasks

Integrations - OnBase links the documents and data within OnBase to the transactions and activities in other enterprise applications.

The OnBase Difference - OnBase puts your world of information in your hands, enabling your organization to be more efficient – reducing costs, increasing cash flow and helping you survive audits

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Professional Document Systems, Inc.
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Professional Document Systems, Inc. a full service document and records management provider, PDS develops and supports solutions in six areas:
1. Document Management Software Systems
2. Document IData Conversion including Paper to digital format
3. Canon Scanners and capture systems, including maintenance/service on hardware
4. Electronic IAutomated Forms
5. Custom Software Applications integrated with document management
6. Agenda Management Software Solutions

Our proven process encompasses the following operations:
1. Project Objectives - What is to be accomplished?
2. Records Evaluation - An in-depth study of the documents to be converted. This includes, but not limited to: identifying areas such as key document characteristics (i.e. condition, locations, preparation required, index information and volume).
3. Process Review - A step by step outline of the methodology and logistics of the conversion project. An Example is as follows:

A. Each project's records will be organized by record type and/or an identifying sequence to distinguish the varying document index requirements and to provide the client with an organized format to assess the scope of the project.
B. Based on the volume of documents, we normally recommend that each departments project be conducted in phases to reduce costs, ensure the greatest degree of quality assurance and to minimize the amount of time the files are "off the shelves" of the department.
C. Based on the record types as outlined in point A, we will organize the project in phases, each phase comprising a full set of documents or mix of full sets.
D. Each phase we be organized in record sets that comprise a total volume ranging from 50 to 100 boxes.
E. Boxes will be organized, coded, transported (to the designated on site or off site scanning location), scanned and returned to the client's storage area in a three to four week time period.
F. When in the custody of PDS, we will provide record retrieval services in two hours or less, with requested pages either hand delivered or emailed to the ASC Member.
G. Upon index completion, each set of records (Phases) will be given to the Member on a series of DVD media as per the specifications. In addition PDS may utilize a series of removable hard drive(s) with the images named in a sequential number format to assist in the importation into the Member's host system. All document images will be multi page tiff or PDF as specified. Each delivery will also contain a text file for the index information as outlined and required by the department.
H. ASC Member receives the DVD(s) and Ior removable hard drive.
I. ASC Member IPDS imports into the enterprise imaging system or copies to internal server locations.
J. ASC Member verifies import Icopy and records accessibility, signs off on batch.
K. New shipment process begins.

4. Scope of Service - As each job varies in objectives and document characteristics PDS compiles a "Scope of Service" that specifically addresses all critical areas. Example as follows:
A. The pickup of the boxes from the ASC and secured transportation to the PDS conversion facility.
B. Preparation of documents for scanning including removing staples, envelopes, rubber bands, etc.
C. The scanning of all documents into the PDS imaging system at 300 DP/.
D. The indexing of all records into the PDS imaging system. Actual index for the files to be as outlined and specified by the ASC Member.
E. The institution of a quality control system to ensure a) Image Readability (100%), b) Image accessibility (100%) and c) indexing accuracy (99%).
F. Documents will be placed back into the boxes in the same order retrieved. Documents can be re-stapled at the request of the ASC Member. PDS may utilize separator sheets will be utilized to segregate packets in the folders.
G. The extraction of the images from the PDS system and the creation of multi-page TIFF or PDF files or file type specified by the ASC Member.
H. The mastering of an external hard drive with multi page TIFF uniquely named to reflect the index criteria.

I. The creation of an industry standard "index/image" import file for subsequent importation into the ASC Member content management system.
J. The retrieval of documents as required by the ASC Member during the conversion process.
K. All labor to complete the job will be supplied by Professional Document Systems.
L. Professional Document Systems will utilize trained supervisory staff including a CERTIFIED DOCUMENT IMAGING ARCHITECT to manage the back file conversion project.
M. All conversion and indexing to meet or exceed ANSI and New Mexico State Records Center standards.
N. The delivery of the documents and media output back to the ASC Member or the optional destruction of the files following management approval.

5. Quality Control - PDS focuses on three critical QC functions; a) Image Availability (100% capture), b) Image Readability (Image Quality) and c) Indexing Accuracy. Our program is designed to ensure superior quality reproduction of your documents. (As described in our Quality Assurance Plan).
6. Location - PDS performs both on site and off site conversion service. The nature of the project dictates what the most cost effective vehicle. In many case it is a combination of both (i.e. scan on site, index off site).
7. Experience - The PDS conversion staff has over 110 years of combined document and data conversion services experience.
8. Price Proposal - A "Turn Key" per image price is our primary costing model to provide the ASC Member with no hidden or estimated costs. All pricing is outlined in the "Cost Summary" of the proposal given to Member.

Environmental policy and green initiative

Electronic Records I Content IDocument Management in and of itself is the essence of reducing waste and increasing efficiency by eliminating paper files and converting to digital format. All equipment sold by PDS & used in the PDS Conversion center are either manufactured by Canon or e-ImageData; all equipment used and sold are "Energy Star"/Generation Green certified.

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SMARTfiles
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Laserfiche Rio on the Cloud provides full-function Laserfiche Rio® licenses, hosted on a cloud server, for a simple monthly charge per user. Laserfiche Rio on the Cloud includes 20GB of storage per user, daily backup, access to the Laserfiche public knowledge base, and a subscription to over 200 Laserfiche training videos. Laserfiche Web Site: www.Laserfiche.com/Products/RioCloud

Storage Management Software - Laserfiche Document Management Software
Laserfiche software acts as an electronic file cabinet where documents can be securely stored and searched, no matter their original source. It can handle a wide variety of capture formats, including: simple scanned document files, Microsoft Office application files, PDFs, and e-mails. Laserfiche is ODBC compliant, which provides easy integration into other ODBC compliant database applications.
The cornerstone of the proposed solution is the Laserfiche Records Management Edition (RME) which has been certified as compliant with the Department of Defense records management standard (DoD 5015.2). Laserfiche RME is unique in its ability to auto- classify records, provide the structure of a formal records management application and the flexibility of a document management system in the same interface.
Laserfiche Digital Signatures allows users to sign a document with an electronic signature in order to validate the contents of a document in a manner that can be trust validation for authenticity.

Laserfiche Web Site: www.laserfiche.com/products/client-server

Laserfiche Digital Signatures
With Laserfiche digital signatures, you can automatically sign and validate your documents as they are created, reviewed and archived without leaving the Laserfiche environment. Laserfiche digital signatures meet the requirements of the Federal Information Security Management Act (FISMA) Compliance, CFR Part 11FDA Compliance, Victorian Electronic Record Strategy (VERS), and Clinton E-Signatures Act.

Web Site: www.Laserfiche.com/Products/Digital-Signatures

Laserfiche Forms
With Laserfiche Forms, you accelerate your business processes by simplifying data collection and processing.
Highlights:
• Ensure accurate and secure data collection.
• Design and modify forms without IT involvement.
• Accelerate business processes.

Web Site: www.Laserfiche.com/Products/Forms

 Laserfiche Workflow
Laserfiche Workflow™ is a flexible, easy-to-use tool for automating and optimizing business processes organization-wide.
Highlights:
• Simplify Complex Tasks.
• Design Workflow Rules with Ease.
• Minimize IT Support.

Web Site: www.Laserfiche.com/Products/Workflow

Laserfiche Records Management Edition
With Laserfiche Records Management Edition, you easily implement an enterprise-wide records management plan, transforming your records program from a cost center into a business asset.

Highlights:
- Reinforce governance, risk and compliance standards.
- Support comprehensive risk management.
- Balance flexibility and control with transparent records management:
- Establish an overarching ECM infrastructure for the enterprise.

Web Site: www.Laserfiche.com/Products/Records-Management

Laserfiche Web Access

Laserfiche Web Access delivers enterprise-wide content management capabilities in a single installation. With Laserfiche Web Access, staff can search, retrieve and work on documents from the Laserfiche repository through their Web browser, whether they're using the corporate intranet, logging in from a branch office or connecting from a laptop or mobile device while in the field.

Highlights:
- Deploy instantly enterprise-wide to simplify support.
- Retrieve, work with and create documents from anywhere.
- Manage multi-site installations to control information assets.
- Expand content access and promote participation in business processes.

Web Site: www.Laserfiche.com/Products/Web-Access

Laserfiche Audit Trail
By constantly monitoring and recording events that occur in your document repository, Laserfiche Audit Trail plays a key role in your organization's enterprise risk management strategy
Highlights:
- Protect information from unauthorized access or release.
- Increase visibility into enterprise processes.
- Generate audit reports quickly and easily.

Web Site: www.Laserfiche.com/Products/Audit-Trail

Laserfiche Connector
Laserfiche Connector integrates Laserfiche directly with line-of-business applications- no coding required. Access and search documents, launch scanning, populate document metadata and perform other routine tasks directly within third-party systems.

At its most basic level, Laserfiche Connector allows you to:
- Search the Laserfiche repository based on fields from primary applications such as CRM and ERP systems.
- Scan a page, automatically populate metadata and store it in Laserfiche-directly from your primary application.
- Connect two applications by allowing one of them to start the other (including the ability to pass parameters between them).
- Coose whether the actions above are triggered from a keyboard shortcut, a button embedded in the application or both.

Web Site: https://www.laserfiche.com/ecmblog/what-you-need-to-know-about-laserfiche-connector/

Kodak alaris is your partner of choice for modern document imaging technology. Kodak alaris offers the broadest range of scanners and integrated imaging equipment on the market.

Kodak alaris Web Site: http://www.kodakalaris.com/ek/US/en/Kodak_Alaris.htm

Records Management Implementation-- This assists those responsible for the record management functions to develop strategies for translating existing paper 'filing and indexing structures into electronic systems.
Software Integrations- SMARTfiles provides this service for an enterprise's need to interconnect several different software applications to share data and improve efficiency.
Data Migration- SMARTfiles provides the service for migrating any information from a legacy document management solution with attached metadata into Laserfiche.
Scanning Bureau Services -- SMARTfiles can accommodate any organization's scanning needs. Our safe, secure, and efficient scanning bureau ensures that even 'the most sensitive documents can be trusted to us for handling.

SMARTfiles can scan your information to any format in existence (pdf, tif, gif, and even proprietary formats). We also offer to do extra preparation of documents (i.e. staple removal, restaple, and sorting) before and after scanning as an optional service.

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Toshiba Business Solutions
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Toshiba Business Solutions As the highest volume DocuWare reseller in the Americas, we have gained a tremendous amount of experience both with DocuWare and other synergistic products such as LincWare and Psigen.

TBS Product Overviews

DocuWare is a modern document management system for professional enterprise content management.

LincWare is eForms and document automation software that simplifies any paper-based process in which compliance and efficiency are critical. Business logic is half of what drives your processes, paper and people make up the rest

PaperCut is a software application that lets you take control and manager your printers, copiers, and multi-function devices.

Drivve is a high performance, feature-rich scanning software that offers you a smart way to enhance and seamlessly integrate your scan workflows into your information infrastructure.

Psigen is an innovative document capture platform engineered to combine automation, efficiency, stability and Enterprise-class scalability. PSI:Capture provides scanning functionality and is able to utilize simple expressions through its Advanced Data Extraction feature to automate processing tasks.

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Approved by: _____   **Date:** _____
    (Armando Aguirre – Executive Director)   **(August 20, 2015)**
    (Armando Aguirre – Executive Director)   **(August 31, 2016)**
    (Armando Aguirre – Executive Director)   **(July 31, 2017)**
    (Sonia Eubank – Associate Executive Director)   **(July 9, 2018)**
    (Armando Aguirre – Executive Director)   **(July 8, 2019)**