



State of Oklahoma
Department of Central Services
Procurement Division

Request for Information

Date: April 8, 2010

Brief Description of Requirement:

REQUEST FOR INFORMATION (RFI) - DOCUMENT MANAGEMENT SYSTEM

THIS IS A NON-BINDING REQUEST FOR INFORMATION ONLY

Response Due Date: *April 27, 2010*

Time: 4:00 PM CST/CDT

Issued By Return To:

Department of Central Services - Procurement Division

- U.S. Postal Delivery: PO Box 53218, Oklahoma City, OK 73152-3218
- Carrier Delivery: 2401 North Lincoln Blvd. Ste. 212, Oklahoma City, OK 73105

Requesting Division: DCS - Procurement/ISD

Contracting Officer:

Name: Keith Hicks
Phone: 405-522-3790
Email: Keith_Hicks@dcs.state.ok.us
Fax: 405-522-8040



SOLICITATION REQUEST

 Request for Quote Request for Proposal Request for Bid**Dispatch via Print**

Department of Central Services
DEPARTMENT OF CENTRAL SERVICES
2401 N LINCOLN, WILL ROGERS BLDG
OKLAHOMA CITY OK 73105

Vendor: NAME

Address: _____

Address: _____

City: _____ ST: _____ ZIP: _____

Request Quote ID.	Date	Buyer	Page
5800000574	04/08/2010		1
Payment Terms	DateTime Quote Open	Closing	
0 Days	04/08/2010 03:00 PM	04/27/2010 04:00 PM	

Requisition Number Reference:

Ship To: DEPARTMENT OF CENTRAL SERVICES
ADMINISTRATION
2401 N LINCOLN, WILL ROGERS BLDG, STE 206
OKLAHOMA CITY OK 73105

Bill To: DEPARTMENT OF CENTRAL SERVICES
ACCOUNTING DIVISION
PO BOX 53488
OKLAHOMA CITY OK 731123488

Supplier Responses

Line	Item # - Descr	Qty.	UOM	Unit Cost	Ext. Cost
1	Document Management System	1	EA		

RFI - Request for Information

Document Management System

Freight Terms: FOB DEST

Ship Via: COMMON

Lead Time: _____

Supplier Remarks:

COMMENTS:

THIS IS A NON-BINDING REQUEST FOR INFORMATION ONLY.

The objective of this RFI is to gain knowledge on the available functions and features of a document management system and the vendors that supply them. We need to know which features come standard and if the features we are requesting are available or can be made available. It is our intent to use the information provided to determine if it is reasonable for us to continue looking for a vendor supplied document management system or if our resources need to be focused on internal development of a solution.

Agency Contact: Carse Wood 405-521-2410

See attached specifications.

This is NOT AN ORDER

All returned quotes and related documents must be identified with our request for quote Number.

Authorized Signature

The document management system should contain but is not limited to the following specifications:

1. Interface

- a. Integration with Active Directory
- b. Integration with Microsoft Exchange, system should allow for specified users to search email records across all email accounts
- c. Web based user interface meeting Oklahoma accessibility requirements
- d. Provide a standard interchange format when necessary to permit the exchange of records and information stored in the system with entities that utilize different software and / or hardware

2. Access – ability to control folder and file access with user rights

- a. Location (Unit)
- b. Rights
 - i. No Access
 - ii. Read only
 - iii. Read, Write but not Delete
 - iv. Read, Write, Delete
 - v. Full Control

3. Search Engine

- a. Search for records meeting keyword search requirements, i.e. by
 - i. Series
 - ii. Flagged record
 - iii. Location
 - iv. User
- b. Ability to export records in the original format

4. Document Management

- a. Control folder naming nomenclature
- b. Control file naming nomenclature
- c. Enter documents in Adobe and MS Office formats
- d. Ability to create custom fields to the entry form
- e. Ability to track modifications to the record by user

5. Retention Management

- a. Enter retention schedule into system
 - i. Series number based on document type
 - ii. Number of years required for retention
 - iii. Ability to grant exemption for retention, i.e. flag records as 'Pending Litigation', file cannot be purged from the system until the flag is removed
- b. Batch purge records by series and date once authorization has been granted

6. Electronically (digitally signed documents must remain valid and legible when viewed in the system and exported from the system

7. Migration

- a. When system is upgraded or replaced, the new system shall be backward compatible with the existing system and all records and applicable indexes in the existing system shall be transferred to the new system
- b. Optical imaging system shall either use CCITT Group 3 or Group4 compression techniques with proprietary alterations to the algorithm or provide a gateway to either Group 3 or Group 4 compression techniques when proprietary compression techniques are utilized.
- c. Nonproprietary file header labels shall be used or the system developer shall either provide a bridge to nonproprietary file header labels or provide a detailed definition of image file header label structures.