

SW782 Imaging Hardware, Software & Services

User Guide

****THIS CONTRACT IS MANDATORY FOR THE EXECUTIVE BRANCH OF STATE GOVERNMENT. ALL USERS MUST READ THIS GUIDE FOR INSTRUCTIONS PRIOR TO USING THIS CONTRACT. ALL ORDERS ISSUED UNDER THIS CONTRACT BY AGENCIES OF THE EXECUTIVE BRANCH MUST BE APPROVED BY THE CIO SYSTEMS PLANNING OFFICE BEFORE ANY EQUIPMENT IS ORDERED OR SERVICES ARE PERFORMED.**

TABLE OF CONTENTS

A.	Introduction	3
B.	Category	3
C.	Rate Reductions	4
D.	Workflow Process	4
E.	Contractors Performance Requirements.....	5
F.	Statement of Work – Form 050	6
G.	Completion of Work.....	6
H.	The vendor shall provide resumes and copies of certifications for the personnel proposed for technical maintenance and support who will be performing duties on site at State Agencies.	8

A. INTRODUCTION

Central Purchasing has entered into a mandatory¹ statewide contract with four (4) contractors to provide Imaging related hardware, software, professional services and scanning services to State Agencies, Counties, Cities, Schools, Hospitals, Municipalities, and Political Subdivisions.

The products and services covered by these contracts are to allow for:

- A.1.1.** EMC and Laserfiche based Imaging systems and the software needed for the function and maintenance of those systems.
- A.1.2.** Sales and maintenance of Imaging related (not print capable) hardware that does not include server level products or switches.
- A.1.3.** Professional services for installation, configuration, integration, support and on-going integration and development related to these Imaging systems.
- A.1.4.** Training for use of the software listed above.
- A.1.5.** Scanning and indexing services for existing government documents.

The products listed on the Vendors' Pricing Schedules are items submitted by the Vendors for consideration. All projects requested by agencies of the Executive Branch require the approval of the CIO Systems Planning division and the CIO office may or may not approve all the items listed on the Vendors' Pricing Schedules.

B. CATEGORY

Awards were made by "category", with contractors being awarded in each category.

- B.1.1.** Category One – Hardware and Hardware Maintenance
 - B.1.1.1.** Business Imaging Systems
 - B.1.1.2.** BMI+ImageNet
 - B.1.1.3.** IImage Retrieval
- B.1.2.** Category Two – Software and Software Maintenance
 - B.1.2.1.** EMC Imaging Systems and related Software
Business Imaging Systems
Get Imaging
 - B.1.2.2.** Laserfiche Imaging Systems and related Software

¹ "Mandatory" generally applies to first time users, agencies that believe the contract will not work for them need to fill out DCS Form 109 that can be found on the website at: https://www.ok.gov/dcs/searchdocs/app/manage_documents.php?id=639 stating requirements for an exception. The request will be reviewed by Central Purchasing and a ruling will be made.

BMI+ImageNet

- B.1.3.** Category Three – Configuration and Training
 - B.1.3.1.** Business Imaging Systems
 - B.1.3.2.** BMI+ImageNet
 - B.1.3.3.** Get Imaging
- B.1.4.** Category Four – Technical Support
 - B.1.4.1.** Business Imaging Systems
 - B.1.4.2.** BMI+ImageNet
 - B.1.4.3.** Image Retrieval
 - B.1.4.4.** Get Imaging
- B.1.5.** Category Five – Scanning Services
 - B.1.5.1.** Business Imaging Systems
 - B.1.5.2.** Image Retrieval (Off-site only, Specialty Scanning)
 - B.1.5.3.** Get Imaging

C. RATE REDUCTIONS

The contractors offer percentage rate reductions from List price of the products and services bid. Agencies wishing to use this contract will be required to get pricing from each vendor in the awarded category.

D. WORKFLOW PROCESS

Step 1.

- D.1.1.** Agency determines need for Imaging products and/or services and creates a Statement of Work² (SOW) Form # 050 outlining the required deliverables.

Step 2.

- D.1.2.** Agency determines which category or categories that will provide the products and/or skill sets required to complete the SOW, including desired levels of maintenance after the project is implemented, and submits the SOW to all contractors, by required category, for a bid response.

Step 3.

- D.1.3.** Contractors return their bid response for the SOW to the agency. The agency evaluates the response(s) and if acceptable, creates a Requisition(s) (Req) for the SOW. Note: the selection process should be documented to justify the selection(s) made.

Step 4.

- D.1.4.** The agency sends a copy of the Requisition, a Form 115 Agency Acquisition Request and a copy of the Contractor responses to the CIO Systems Planning division for approval.

² All forms are maintained on the DCS website, under Statewide Contracts / Statewide Contract Numerical List / SW60715

Step 5.

- D.1.5.** After CIO Systems Planning office approves the acquisition, the agency issues the Purchase Order to the contractor.

Step 6.

- D.1.6.** The contractor completes the work described in the SOW. See Section F.

Step 7.

- D.1.7.** Contractor(s) completes Certification of Completion and Acceptance Form³ #051 and submits to agency for approval and signature. See Section G.

Step 8.

- D.1.8.** Agency completes a Contractor Performance Report Form #052 for each contractor and sends completed form to the DCS Contracting Officer.

E. CONTRACTORS PERFORMANCE REQUIREMENTS

The contractor(s) will provide information technology consulting services to any agency of the State of Oklahoma or government entity, in accordance with the terms and conditions of the Statewide Contract Request for Proposal.

The contract(s) are for the products and services listed only. If additional items are needed they shall be obtained through other state contracts or procurement efforts.

Upon request from the state agency for a particular personnel skill set, the contractor(s) shall provide resume(s) of available consultants. The contractor agrees that any agency requesting services under this contract shall reserve the right to accept or reject any of the contractor's consultant(s).

The contractor must notify both the requesting ordering agency and the Department of Central Services, Central Purchasing Division in writing when they are unable to offer professional services or products when a specific SOW is submitted to the contractor.

Subcontractors - The ordering agency and the DCS contracting officer shall approve, in writing, the use of any subcontractor before a subcontractor can be used in performance of any portion of this contract.

Ramp Up Time - The agency reserves the right to terminate payment for contractor staff assigned to the agency effective upon written notice to the contractor if performance does not meet the agency expectations. The contractor must provide a replacement(s) acceptable to the agency. When any replacement is necessary, the "ramp up time" for

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the replacement(s) staff time will be at no cost to the agency. The “ramp up time” for replacement(s) staff will be determined by the agency and the contractor on a case-by-case basis. If the agency and the contractor cannot come to terms on the ramp up time, the agency will notify the contracting officer at DCS to start a mediation procedure.

Agency Status Reports - Contractor will provide project status reports to the agency, if requested, of all projects that exceed one week. Such reports will be at a frequency and with a content agreed to between Contractor and the agency.

F. STATEMENT OF WORK – FORM 050

Guidelines

- F.1.1.** Agencies will submit a SOW to all awarded Contractors requesting a written proposal addressing the Statement of Work.
- F.1.2.** Selection of the contractor(s) to perform the SOW is subject to the approval of the CIO Systems Planning division.
- F.1.3.** The contractor and the agency's designated Project Manager must indicate mutual acceptance of the SOW by signing and dating the final SOW. The agency's designated Project Manager (1) must retain one signed copy; (2) must forward the other copy, plus a copy of the Purchase Order, to the Department of Central Services, Central Purchasing Division for inclusion in the contract file and (3) must send one copy to the contractor's Project Manager.
- F.1.4.** The contractor's response to the SOW must be within the scope of the contract and must not change any provision of the contract.
- F.1.5.** The agency's designated Project Manager has the right to terminate the SOW at any time, for the convenience of the agency, without penalty or recourse, by giving written notice to the contractor at least five working days prior to the effective date of such termination.

Requirements

- F.1.6.** Changes to the SOW required under this contract must be bilaterally made. Any change to a SOW that alters the deliverables, the categories, rates used, or completion schedule must be approved in writing by a revised SOW, signed by the agency and the contractor and approved by the CIO Systems Planning division and the DCS Central Purchasing division.
- F.1.7.** The agency and the contractor will designate a coordinator to represent them in all matters concerning the services provided and will be responsible for the supervision, direction and control of its respective personnel.

G. COMPLETION OF WORK

Upon the completion of the requirements under each SOW, the Contractor will obtain a signed DCS Form 051 "Certificate of Completion And Acceptance"⁴ to show satisfactory performance and final completion of each order.

Acceptance of the work by certification shall be final and conclusive.

Unless otherwise required by the SOW, acceptance is final and conclusive at close of business on the 10th working day after the date that Contractor notifies the agency of its completion of the work and tenders a Certificate of Completion for the agency's signature. The "Certificate" is considered final regardless of whether or not the agency signs the certificate, unless, within this period, the agency identifies to Contractor valid corrections necessary to a specific portion or portions of the work.

To be valid, corrections identified must be: (1) to work, in which no portion of it has been changed by the agency; (2) due to Contractor independent work performance that fails to conform to the SOW, or due to Contractor failure to follow specific work direction given by the agency; and (3) reasonably verifiable by Contractor.

Work performed specifically to the agency's direction or modifications to the work by the agency, following Contractor completion, does not qualify for an exception to final acceptance within the 10 working days as described above. For example, where specific changes are directed to a software program by the agency, Contractor performed those specific changes accordingly, and the software then failed to perform as the agency expected, consequent changes that must be made is the responsibility of the agency, and acceptance is still final and conclusive within 10 working days.

Similarly, where the agency changes Contractor work on its software or changes another portion of such software and the software then fails to perform as expected, acceptance shall still be final and conclusive within 10 working days.

Following final acceptance of the work, payment is due and any further services will require a new SOW and purchase order or modification of the existing one(s) to incorporate changed work and add funds to pay for such work.

The following sections outline the "Categories" with defined "Skill Sets" and contractors contact information.

Categories

- G.1.1.** Category One – Hardware and Hardware Maintenance
- G.1.2.** Awarded Contractor shall provide Hardware recommendations, installation and maintenance pursuant to Sections C.2.2, C.2.4, C.2.5 and C.3 of the Request for Proposal.
- G.1.3.** Category Two - Software and Software Maintenance

⁴ All forms are maintained on the DCS website, under Statewide Contracts / Statewide Contract Numerical List / SW60715

- G.1.4.** Awarded Contractor shall provide Software recommendations, installation and maintenance pursuant to Sections C.2.1, C.2.4, C.2.5 and C.3 of the Request for Proposal.
- G.1.5.** Category Three - Configuration and Training
- G.1.6.** Awarded Contractor shall provide Software recommendations, installation and maintenance pursuant to Sections C.2.1, C.2.2, C.2.5 and C.3 of the Request for Proposal.
- G.1.7.** Category Four - Technical Support
- G.1.8.** Awarded Contractor shall provide Software recommendations, installation and maintenance pursuant to Sections C.2.1, C.2.2, C.2.4 and C.3 of the Request for Proposal.
- G.1.9.** Category Five - Scanning Services
- G.1.10.** Awarded Contractor shall provide Software recommendations, installation and maintenance pursuant to Sections C.2.3 and C.3 of the Request for Proposal.

Skill Sets

- G.1.11.** Work with State Agencies to analyze business practices and recommend scanning processes and workflows that will fill the needs of agency business and ongoing scanning operations.
- G.1.12.**
- G.1.13.** Provide information and recommendations on best practices for document scanning, quality assurance and quality control methodologies.
- G.1.14.**
- G.1.15.** Work with the agency IT staff and provide recommendations on training procedures for both CMS end users and scanning operators.
- G.1.16.**
- G.1.17.** Recommend equipment and procedures for the preparation of documents to be scanned.
- G.1.18.**
- G.1.19.** Work with agency IT department (s) to recommend optimization techniques and any additional software or hardware that could be used to minimize the impact on IT infrastructure.

H. THE VENDOR SHALL PROVIDE RESUMES AND COPIES OF CERTIFICATIONS FOR THE PERSONNEL PROPOSED FOR TECHNICAL MAINTENANCE AND SUPPORT WHO WILL BE PERFORMING DUTIES ON SITE AT STATE AGENCIES.