Request for Proposal # 13
Issue Date: April 2, 2013

Proposals will be received in the Purchasing Department at the above address until

11:00 AM on Thursday, April 18, 2013

Proposals will be publicly opened at this time. Late proposals will not be accepted.

Document Imaging and Management System

Oakton is seeking a proposal to implement a comprehensive document imaging and management system which will allow the college to scan, capture, index, retrieve, process and archive digital images of documents and forms. Please quote on both a three year and five year contract.

After a thorough review and evaluation of the responses submitted, the College will select the one company that best meets our needs and is in the best overall interests of the College.

Please submit three copies and an electronic copy of your proposal.

Technical questions regarding this proposal should be directed to Renee Kozimor, Director of Software and User Services at: rkozimor@oakton.edu and business related questions should be directed to Wayne Szatkowski, Purchasing Manager at: wszatkow@oakton.edu.

________________________________________________________

Oakton Community College District 535 is exempt from all Federal, State and Municipal Taxes.

I have examined the specifications and instructions included herein and agree, provided I am awarded a contract within 60 days of the proposal due date, to provide the specified items for the sum shown in accordance with the terms stated herein. All deviations from the specifications and terms are in writing and attached hereto.

Company Name: __________________________________________ Date: _______________

Address: __________________________________________ City/St/Zip: __________________

Name: __________________________________________ Title: __________________

Phone # __________________________________________ Fax # __________________

Signature: __________________________________________ E-mail: __________________________
Instructions to Vendors

1. Bid Forms: Proposals should be submitted on the form provided. Envelopes marked “Sealed Proposal For…” Proposals cannot be accepted via fax machines.

2. Specifications: Generally, where specifications indicate a particular brand or manufacturer’s catalog number, it shall be understood to mean that or equal, unless “no substitutes” is specified. When offering alternates, they must be identified by brand name, catalog number and manufacturer’s literature must be included.

3. Samples: Vendors will be required to furnish no charge samples upon request.

4. F.O.B. Point: All prices must be quoted F.O.B. destination. Shipments shall become property of Oakton Community College after delivery and acceptance.

5. Delivery Points: Deliveries will be made to the various buildings within the district, as indicated.

6. Delivery Schedule: Bids must specify delivery time. Unrealistically long delivery times may cause proposals to be rejected. Order may be canceled without obligation if delivery requirements are not met.

7. Evaluations: Oakton Community College reserves the right to reject any and all proposals, to waive any technicalities in the proposals, and to award each item to different vendors or all items to a single vendor.

8. Vendor Selection: The College will review all proposal information and select the one company that is in the College’s best interests.

9. Prices: Prices, terms and conditions must be firm for acceptance for sixty (60) days from the date of proposal opening unless otherwise agreed to by District #535 and vendor.

10. Quantities: Quantities shown may be estimates only and orders may be more or less depending on actual requirements and budget limitations.

11. Exceptions: Any exceptions to these terms, conditions or deviations from written specifications must be shown in writing and attached to the proposal form.

12. Tax Exemptions: Oakton Community College District #535 is exempt from Federal, State and Municipal taxes. Exemption certificates will be furnished upon request.

13. Equal Employment Opportunity Clause/Prevailing Wage: Oakton Community College is an equal opportunity employer, and parties doing business with the College must comply with the Equal Employment Opportunity Clause as required by the Illinois Fair Employment Practices Commission. Not less than the prevailing wage shall be paid for labor on the work to be performed as required by law.

14. Non-Collusion Clause: The vendor or agent hereby declares that he, nor any other agent of his business, entered into any collusion or agreement relative to the price to be bid. He further declares that no persons, firms or corporations, have or will receive directly, any rebate, fee, gift, commission, etc., or that any employee or Board of Trustee member of Oakton Community College District #535 has any undisclosed interest in the awarding of this contract.
General Proposal Information

1) Please supply three paper copies and one electronic copy of your proposal.

2) The proposal will be awarded at the May 21, 2013 Board of Trustees meeting.

3) Prior to making a final decision, the College may ask that vendors come to the Campus to make a presentation and take part in an interview.

4) Because this is a sealed proposal, the College cannot accept your response over the phone, by fax or e-mail. If you are sending your proposal via an overnight carrier please address the envelope to:

Oakton Community College
Attention: Purchasing Office Room 1540
Proposal #13
1600 East Golf Road
Des Plaines, IL 60016

5) The College is exempt from all taxes.

6) If your company will not be submitting a proposal, please return this sheet marked “NO BID.”

7) The College participates in the following purchasing consortiums:
   Educational and Institutional Cooperative Services (E & I)
   U. S. Communities, Government Purchasing Alliance
   Illinois Department of Central Management Service (CMS)
   Illinois Community College System Foundation (ICCSPC)
   Illinois Public Higher Education Cooperative (IPHEC)
   Midwest Higher Education Consortium (MHEC).

Any appropriate discounts and/or special pricing from these consortiums should be applied to this bid.

8) Based upon past practice, the College may consider payment discount terms. See page 1.

9) The College is a public institution and therefore subject to comply with legitimate Freedom of Information Act (FOIA) request. Please be advised that your response to this request for proposals is subject to comply with any FOIA requests for information.
Overview

Oakton Community College is a two year community college in Des Plaines, Illinois, serving 465,000 residents of northeast suburban Cook County. Oakton’s fall 2012 credit enrollment was 10,406 students with an FTE of 5,766. Almost one-third of the fall students were new to the college. The college also supports an extensive non-credit curriculum. Oakton processes over 5500 financial aid applications each year, and has approximately 1200 employees.

Oakton is seeking a proposal to implement a comprehensive document imaging and management system which will allow the college to scan, capture, index, retrieve, process and archive digital images of documents and forms. For over 15 years Oakton has relied on SpeedScan to support our digital imaging needs, primarily in Registration and Records, Financial Aid, and Human Resources. The SpeedScan products being used are now old and unsupported, and Oakton’s need for digital imaging services has greatly increased in recent years. In addition to improving productivity by reducing or eliminating time spent handling, storing, retrieving, distributing and destroying paper, we expect a document imaging system to improve business process management with workflow and enhanced security.

Like most colleges and universities Oakton is still a paper intensive organization. Updating our imaging system is essential to managing the information flow at the college. The system will support multiple departments across two campuses. The solution must provide implementation, conversion, testing, training and support to replace our existing scanning and image management system, and must also include integration with our enterprise software, Banner.

The goal of this RFP is to assess document imaging and management technologies and costs, and choose a product that will best meet the needs of the college, now and in the future. The successful vendor will be expected to provide a list of successful implementations at educational institutions of similar size and complexity.

Dates and Timeframes*

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Issued</td>
<td>April 2, 2013</td>
</tr>
<tr>
<td>Deadline for Vendors submission of proposals</td>
<td>April 18, 2013</td>
</tr>
<tr>
<td>Approval of contract award by Board of Trustees</td>
<td>May 21, 2013</td>
</tr>
<tr>
<td>Software Implementation</td>
<td>Summer 2013</td>
</tr>
<tr>
<td>Project Time Frame</td>
<td>May 2013 – October 2013</td>
</tr>
</tbody>
</table>

*The college reserves the right to change or alter these times and activities.

Three signed and sealed copies of the proposal should be mailed or delivered to:
Oakton Community College
Attention: Purchasing Department, Room 1540
RFP#13
1600 E. Golf Rd.
Des Plaines, IL 60016
1. Functional and Technical Requirements

Our requirements are categorized below. Some requirements are optional, but strongly desired. In your response, please note whether your solution meets these requirements, and whether you meet the requirements “out of the box” or with additional programming or configuration. Use space following each requirement to elaborate, if needed, to provide a clear understanding of the proposed solutions compliance in each case. If features are not currently shipping as of the due date of this document please indicate when the feature will be out of beta and generally available.

Scanning and Quality Assurance
1. Save scanned images in open, industry standard graphics format
2. Batch scanning capabilities for high volume production environment
3. Supports both centralized and decentralized scanning operations, including remote scanning to multiple locations via TCP/IP route
4. Upload scanned batches directly to the server
5. Scan batches locally and upload batches to server at a time the user specifies
6. Option to send scanning output directly to workflow
7. Option to send scanning output directly to a user specified collection of documents
8. Easily configure, name, save, select and distribute capture settings such as document source, proposed index keys, workflow routing and OCR and page content indexing
9. Configure, save and apply scanner settings such as resolution, page size, orientation, brightness, threshold and image processing
10. Support for a full range of entry level to high speed scanners from a choice of manufacturers, with options including simplex and duplex, monochrome and color
11. Compatibility with Kofax VirtualReScan (VRS) scanning software
12. Support for deletion of blank pages during scanning
13. Support for wide range of scan time image processing filters (please detail)
14. Options to perform quality assurance (QA) on images at scan time, and bypass QA if desired
15. Distribute quality assurance of scanned batches to locations/resources outside of the scanning location

Indexing/Metadata
1. Flexible, customizable indexing options
2. Dedicated ‘document type’ index key to help classify documents and control security
3. Creation and assignment of custom properties based on document type
4. Ability to distribute indexing process among workstations and locations
5. Configure document key assignments via user prompt prior to scanning
6. Automatic scan-time indexing via bar code
7. Automatic scan-time indexing via OCR
8. Index documents to records in existing business software without manual entry
9. Use single keystroke to index multiple fields during batch processing
10. Ability to re-index documents via manual entry or single click associated with host records
11. Ability to configure and select predefined index values via a drop down menu or pick list
12. Index documents with user configurable data elements not taken from the host application, such as date, time, unique ID, serial number, predefined list and free form text entry
13. Index multiple documents as a group with re-entering index values for each page
14. Automatically index documents based on a single known document key, through the retrieval and application of related index values from an external database
15. Automatically and periodically validate existing document keys against an external database
16. Individual documents can easily be indexed ‘same as last document’

**Electronic Forms**
1. Integrated feature to capture information using fully customizable, formatted, electronic data collection forms either as a standalone document or a document associated with existing documents and projects in the system.
2. Electronic forms features available in thick and thin clients
3. Electronic forms can be associated with projects
4. User friendly form designer to allow for easy creation of custom electronic forms
5. Electronic forms can use industry standard HTML, XSLT, CSS and JavaScript for design, navigation, data collection and validation processing
6. Electronic forms can be automatically pre-populated with data such as user information
7. Option for validation of user-entered electronic form data from external ODBC data source and resulting auto-population of defined fields in electronic form
8. Allow collected electronic form data to populate document index values and custom properties and to be shared with external ODBC sources
9. Electronic forms can be associated with documents inside or outside of workflow
10. Ability to add attachments to an electronic form
11. Ability to submit an electronic form to version control
12. Electronic forms can be moved, resized, hidden and docked to the document viewer window
13. Ability to print electronic forms as hard copy, electronic formats or document management system files
14. Ability to convert standalone and supplemental form types from HTML to TIFF to allow annotation and emailing of forms
15. Electronic form source files used by multiple electronic forms can be uploaded once and shared for increased efficiency and a common look and feel
16. Multiple electronic forms can be associated with each document
17. Pre-built sample electronic forms are included to illustrate methods and features such as dynamic navigation, data management and validation

**Forms Processing**
1. Option to collect data from scanned forms using advanced OCR functionality capable of following predefined rule sets
2. Option to collect data from forms acquired as bitmap format documents through either the software’s own scanning subsystem or through an automatic import process from external systems
3. Distinguish between document types (invoices, transcripts, etc) and identify variations with types
4. Automatically index forms based on extracted data
5. Ability to process both structured and semi-structured forms
6. Ability to extract line item data from forms
7. Provide group verification of uncertain characters
8. Provide context verification of text field contents for uncertain characters
9. Provide tools to configure rule set based recognition for a wide range of both structured and semi-structured documents, as well as custom forms design
10. Share validated data with third party applications in a variety of formats
11. Automatically route captured and validated forms into workflow module of imaging system
12. Tight integration of forms processing and imaging system

Electronic Capture and Object Support
1. Capture a variety of physical and digital objects – paper documents, digital photos, microfiche, faxes, email, COLD output, native document files, and the print output of any Windows application with a print function – in a single electronic repository
2. Import, store and display a wide range of digital objects in their native formats including Microsoft Office, PDF, JPEG, TIFF, HTML, XML, DWG, DXF, and audio/video media files.
3. Allow for easy import of digital photographs, directly from a user’s camera
4. Support for compound documents (Tiff, Word, PDF) and on-demand document merging
5. Automatically import single files or batches and send them directly into the imaging system’s workflow environment
6. Import files into the imaging system on demand using the desktop client software, thin client software and business application-specific client modules
7. Provide multiple methods for automatically indexing imported files
8. Split or unbundle multipage TIFFs on import
9. Automatically import, index and route email and attached files, preserving the original format of all attachments
10. Provide multiple methods for automatically importing faxes
11. Ability to ‘print’ documents from typical desktop business applications (email, Office, Acrobat, proprietary applications that offer a print command) directly to the imaging system, without manual printing and scanning.
12. Ability to ‘print’ documents in bulk, directly to the imaging system from printing activity triggered by Windows batch scripts, UNI cron jobs, or applications that schedule their own output, and perform text extraction without OCR
13. Provide multiple options for capturing EDI data

Printing/Faxing/Output
1. Print to any print device within a platform’s standard desktop/network printing environment
2. Ability to print documents with or without all annotations or only visible annotations
3. Print single selected pages within a multi-page document
4. Print multiple pages
5. Print documents from a list view such as search results or workflow queue, without opening each document
6. Print a list of documents, rather than the documents themselves, from a list view such as search results or a workflow queue
7. Option to selectively overprint relevant document values such as page number, date and time and document keys on each page
8. Control printing permissions through application security
9. Integrated outbound faxing
10. Option to selectively export files in their original forms
11. Option to selectively export files in alternate formats such as PDF or TIFF
12. Ability to save, recall, and secure predefined output configurations for the control of automated document output, including options for native and converted file export, emailing, printing and faxing
13. Automated printing and exporting triggered by workflow events, server APIs, other application modules, or values generated by external applications

Retrieval / Search / Presentation
1. Integrated document retrieval from business applications; single click access to documents from any customer/employee/vendor/student record displayed
2. Search documents, projects, and tasks via a single search condition relevant to the context currently being viewed
3. Build complex, multi-condition queries on documents, projects and tasks
4. Ability to save both simple and complex queries for future use, creating dynamically generated lists of documents, projects, and tasks that meet both predefined and variable conditions such as current record value in an external application
5. Ability to secure saved searches and the presentation of documents and projects by both individual user and group
6. Ability for both individual users and groups to customize and refine the standard conditions of saved searches
7. Ability for both individual users and groups to customize and save the presentation of search queries by column configuration, sort order, and grouping of results.
8. Ability to save and customize prompted search queries
9. Ability to search on and find text located within the results grid
10. Ability to display calculated statistics about the documents and document properties contained within a list view
11. Full text search the content of scanned documents and a wide range of native document formats simultaneously, with both full text and natural language search options and a variety of concept, proximity and evidence operators
12. Build and execute searches for enterprise/COLD reports from the same familiar interface as that used for simple, complex and full text searches
13. Determine item display sort order, before or after a search, using any combination of item metadata individually designated as ascending or descending
14. Ability to group the display of documents and projects in any list view

Workflow
1. Integrated workflow environment (Please indicate if this is included in system or additional cost; costs must be identified in pricing section, as workflow is a required feature)
2. Drag and drop graphical workflow design tool
3. Point and click interface for assigning users and groups to queues and defining detailed routing privileges
4. Ability to copy and move workflow queues to easily facilitate workflow creation
5. Ability to both print and export graphical workflow diagrams
6. Ability to structure workflow efficiently in support of staff absences, turnover and workload balancing
7. Ability to configure ‘out of office’ setting for workflow users, in support of document re-routing and other automatic actions
8. Ability to use workflow independently, without integration into business applications
9. Ability to use document management system independently, without requiring users to take advantage of workflow features
10. Ability to create advance workflow logic using plain language, meeting many workflow objectives without scripting
11. Ability to automate workflow routing based on defined index values, priority, creation time, document type, length of time in queue, user/group who routed document, previous queue, document type, custom properties and project type
12. Ability to create and apply custom scripts written in industry standard scripting language to automate queue actions on current, inbound or outbound documents
13. Ability to dynamically display queue specific workflow status, workflow alarms and administrator messages on each client’s workstation
14. Full range of route types including sequential, sequential automatic, conditional, parallel, conditional parallel, inter-process routes and automatic system queues
15. Ability to route not only scanned paper but electronic objects such as email, PDFs, Office documents and more
16. Ability to capture information about workflow user actions and document routing – including the queues a document has been in, user interaction with the document, and additional relevant data for reporting
17. Ability to assign specific workflow process and queue management roles to defined users and groups
18. Ability to automatically perform time based document removal actions from any workflow queue
19. Ability to route objects that are only partially indexed
20. Ability to set queue specific default destination queues for routed objects.

Document Viewer
1. Document viewer can display a wide range of digital object types in their native formats, including Microsoft Office, PDF, JPEG, TIFF, HTML, XML, DWG, DXF, and audio/video media files.
2. Document viewer allows flexible, user-configurable display of index keys, document properties, document notes, predefined actions, tasks, page thumbnails, associated electronic forms and toolbars
3. Ability to display documents side-by-side with records in the business application
4. Single page viewing
5. Multi page (MDI) viewing – display two or more pages simultaneously on the user’s screen
6. Multiple options for zooming in document viewer
7. Easily select preset page region views, both system and user defined
8. Multiple view panning options to easily adjust current position of viewed area on magnified image
9. Apply document annotations such as stamps, sticky notes, text and redactions to bitmap images directly within document view interface
10. Rotate documents in document viewer and save rotated views
11. Integrated view enhancement options such as on-screen image inversion (reverse black and white) and smoothing
12. Ability to reorder pages within the document view interface, and add pages to existing document via drag and drop
13. Perform common operations such as re-index, copy, email, export, print, fax and delete pages within document view interface

14. Copy or move pages from one document to another from within the document view interface

15. Document viewer works with familiar, existing desktop email software for simplified sending of images (or links to images) to email recipients outside of the imaging system’s workflow

16. Email selected documents or document links directly from document viewer interface, with options for page selection, annotations inclusion, multipage TIFF generation, selectable headers and footers, and file renaming

17. Convenient and flexible page selection interface within document viewer

18. Ability to open a viewer displayed document in an associated application for viewing or editing

19. Ability to designate documents for collection into user defined project groupings directly from document viewer, without using index values

20. Ability to add documents to workflow or route documents within workflow directly from document viewer

21. Ability to copy and paste document text

22. Ability to define relationship between documents and display related documents in a view integrated with the currently displayed document

**Annotation/Redaction**

1. Comprehensive set of annotation tools

2. User and group-specific annotation security profiles

3. Original images in object store remain unaltered by annotation

4. Flexible, easy-to-use, secure redaction

5. Support for automatic redaction

6. Support for attaching OLE objects and URLs as annotation

7. Ability to print, fax, or export documents with or without all annotations or only visible annotations

**COLD/Enterprise Report Management**

1. Capture wide variety of print output from line-of-business systems and convert into searchable, non-proprietary pdf files

2. Capture basic and advanced print streams in ASCII, EBCDIC text, PDF, IBM AFP, Xerox Metacode, HP PCL, and PostScript formats

3. Monitor a different directory for each type of print stream

4. Provide an enterprise report user interface optimized for searching, viewing and previewing report documents

5. Allow searches against line item values, not just index values

6. Provide user access to select formatted pages related to records in the business application, such as a single invoice from a large print stream

7. Define a different set of graphical form overlays for each type of print stream

**Collaboration and Project Support**

1. Integrated workflow environment providing rapid customization, configurable user privileges, and automated routing and alerts options, all in support of group collaborations

2. Version control option that allows multiple users and groups to collaborate on documents with complete check-in/check-out privileges, version management, digital signing, and the ability to input comments for other users when doing check-ins and check-outs
3. Ability to assign tasks, outside of formal workflow, which instruct a coworker or business partner to perform a document or project related action such as signing, addressing document and project deficiencies, or reviewing
4. Ability to define relevant, standardized reason phrases that can be used to record intent related to specific user actions and enhance communication between users
5. Tools for annotating or markup up, bitmap images for review, approval or other processing purposes
6. Option to store a field of free-form text with each image, in support of group collaboration
7. Capability to associate customizable electronic data collection forms with documents and projects in the system to assist users in sharing information
8. Ability to group related documents in user-definable categories distinct from their index values, in support of project organization and collaboration
9. Ability to create, define and view relationships between projects
10. Interface allows rapid drag-and-drop creation of system ‘shortcut’ icons that are linked to, and associated with, distinct imaging system entities such as documents, batches, projects, workflow queues, and search queries
11. Ad hoc shared document viewing, allowing one user to invite another user to simultaneously view a document on screen without first closing or putting document in workflow
12. Ability to send messages to individual imaging system users or all users currently logged on, directly from the administrative interface

Integration
1. Direct integration with many business applications without programming
2. Extended integration functionality that allows placement of imaging application icon in the screens of business applications to initiate document retrieval or other actions in the imaging system
3. Prior history of integration with Ellucian/Banner solutions
4. Prior history of integration with College Board PowerFAIDS solutions
5. Ability to demonstrate integration capabilities during the sales process by performing an actual integration demonstration
6. Integration via web services standards

Application Interface
1. Flexible, configurable application toolbar provides direct access to batches, documents, projects, tasks, reports, workflow, capture, management and integration settings
2. User interface provides interactive views based on integration presets, batches, predefined document sets, user-entered searches, projects, tasks, and workflow
3. Extensive use of ‘drag and drop’ to simplify and enhance the moving of objects within, into, and out of document management system windows
4. Ability to create multiple copies of documents, while maintaining a single physical document reference
5. Administrative option to secure the user interface against customization
6. System provides a recycle bin to allow users to recover accidentally deleted documents and ensure documents are only permanently deleted from the repository by authorized users, if so configured
Clients

1. Both thick and thin client options on a variety of platforms
2. Option for embeddable clients which can add document management system functions to the interfaces of third-party platforms and applications such as eCopy, epic, ESRI, HP, Lexmark, Xerox, Microsoft Office, and Microsoft SharePoint
3. Ability to securely interact with documents and participate in workflow via WAN, LAN, VPN, from any location via TCP/IP.
4. Automatic client log-off initiated by new log-on from different location
5. Client can be installed or auto-updated from the server
6. Automatic log-in process to speed access to application by OS-authenticated user
7. Ability to temporarily exceed the number of purchased client licenses in compliance with a predefined license auditing program
8. Integrated tool to assess performance of client workstation hardware and network configuration directly from the desktop
9. Integrated tool to track efficiency of key operations in the client from an end-user perspective such as the time to open a document or route an item in workflow.
10. Workstation support exists for the following:
   a. Clients:
      - Windows XP Professional SP2 or SP3
      - Windows 7 (32 bit and 64 bit)
   b. Web Client Browser Support:
      - Internet Explorer 7.x or 8.x (Windows)
      - Mozilla Firefox 3.x (Windows)
      - Google Chrome

Retention Policy Management

1. Easily defined, rules based retention and disposition policies
2. Support for automated document dispositions and transfers
3. Create litigation and audit holds which prevent modification and deletion of information
4. Manage retention policies for and track the physical location of paper documents
5. Require approvals on dispositions
6. Track information lifecycle with comprehensive auditing
7. Create reports with retention data

Security

1. Encrypted communication between server and clients
2. Option for SSL encryption
3. Server storage subsystem with encrypted object math metadata, secure object store connectivity (no client-level direct access or drive mapping required) and the availability of volume level data protection
4. Comprehensive designation of system privileges by user and group
5. Ability to copy user and group privileges to simplify security configuration
6. Document access control via logical filing hierarchy
7. Control users’ actions on documents based on defined ‘document type’ value
8. Control users’ batch access
9. Control access to integration presets
10. Control document access via workflow queue
11. Control access to project types
12. Control ability to manage all workflow processes or only specific ones
13. Multiple user authentication options which build on Oakton’s existing security infrastructure, including user names, passwords, and identity servers (indicate whether your response applies to a customer hosted or a vendor hosted solution)
14. Configurable, automatic user logoff due to inactivity
15. Automatic client logoff can be initiated by a new logon from a different location
16. Provide options for logging client, server and user authentication actions
17. Audit actions of defined clients from an administrative interface

Server and Communications Architecture
1. Flexible n-Tier client server design that supports centralizing or distributing processes via any combination of Microsoft or UNIX server platforms
2. Scalable server design
3. Support for high availability configuration
4. Support for clustering and load balancing
5. Secure single port client/server TCP/IP communication for efficient performance across firewalls
6. Ability to store or retrieve documents without drive mapping
7. Encryption of object storage path for enhanced document security on server file system
8. Data must be encrypted (SSL or similar) when transmitted across the public wire
9. Use of platform specific database drivers for maximum performance
10. Server side extensibility, including scripting and web services
11. Supports wide variety of non-proprietary storage options, including RAID, Server Attached Storage, NAS, SAN, and hierarchical storage management schemes
12. Consistent performance regardless of document quantity
13. Consistent performance regardless of user load

Server Administration
1. Graphical administrator interface on Windows servers
2. Ability to configure all server settings on one screen
3. Ability to automatically distribute capture and device profiles to clients
4. Ability to send messages to individual imaging system users or all users currently logged on, directly from the administrative interface
5. Monitor workflow queues from administrative interface
6. Configurable automatic user logoff due to inactivity
7. Ability to disable user accounts without deleting them
8. Monitor license availability and usage from administrative interface
9. View real time list of logged on clients, with information about licensing, group membership, IP address, and time connected
10. Integrated server side tools to provide on demand performance analysis of server processes
11. Audit specific actions of defined clients from the administrative interface
12. View all database table names and properties directly from the administrative interface
13. View server log files from the administrative interface
14. Graphical interface for document repository configuration such as mirroring, spanning, set creation, tree creation, tree properties
15. Add new users in bulk from the Windows domain, LDAP server, text file or local machine
16. Import of users from text file allows multiple delimiter types and interactive field mapping
17. Available automatic synchronization of imaging system users and groups with those on an LDAP server or LDAP enabled Active Directory server
18. Please indicate if the following server operating systems are supported:
   a. Microsoft Windows Server 2008 SP2 (32 bit or 64 bit)
   b. Microsoft Windows Server 2009 R2 (64 bit)
19. Linux (Intel) RedHat Linux version 4 or 5, or SUSE Linux, Enterprise 10
20. Please indicate if the following Databases are supported
   a. Oracle 10g/11g
   b. Microsoft SQL Servers 2005, 2008 and 2008 R2 (standard or enterprise)

Storage
1. Data storage subsystem uses industry standard file formats, file systems and storage devices
2. Support for multiple customer selected storage technologies, including hard drive, RAID, NAS, SAN and optical
3. Server storage subsystem includes secure object path metadata, secure object store connectivity and the availability of volume level data protection
4. Support for flexible configuration and management of document storage structures
5. Support for spanning object stores – represent several physical drives as one logical drive, allowing a single designated storage area to be much larger
6. Support for mirroring object stores – distribute duplicate object storage structures to multiple sites
7. Support for data set management – move, copy, delete and reconfigure object store structures based on business needs
8. Provides the ability to manage multiple working copies of the repository for high availability and performance.

2. Additional Administration Tools
   a. The document imaging system must authenticate against an external LDAP server and Microsoft Active Directory to support Oakton’s single sign on system.
   b. The system must allow multiple administrative users to securely access logging and reporting data. Describe the process for setting up administrative users and access rights.
   c. Please provide a list and samples of all reports available to administrators.
   d. Please identify the process for requesting and receiving system patches, enhancements and upgrades, and indicate how often they are released.
   e. Please identify any utilities that assist with backup and restoration.

3. Implementation Services
Briefly describe the project management and implementation support proposed for the project.
4. **System and Hardware Requirements**
Please identify hardware specifications, including operating systems versions, revision levels, patch levels and software incompatibilities. Identify database requirements, preferred hardware and operating system. Please confirm that your software supports virtualization.

5. **Hosting Services**
Oakton is not necessarily seeking a hosted service, but would consider this option. If you offer hosting, please describe your hosting capability, if applicable, the service level agreements and average uptime per month.

6. **Reference Sites**
Provide a minimum of three educational institution reference sites where your product has been in production for at least one year, where the Student Information System is Banner, and the user authentication is to an LDAP directory.

7. **Customer Support/Maintenance/Training**
Please describe your customer service options, including:

- a. Modes of support (email, forums, telephone)
- b. Support hours
- c. Description of your support team
- d. What is included in your standard maintenance
- e. Training options provided (onsite? Online? Public classroom?)

8. **Pricing Quotation**
Please provide pricing for an Oakton hosted model with licensing/maintenance costs for a 3 and 5 year contract on page 17, “Price Page”. Please identify one time versus recurring costs, and break out pricing as necessary. Oakton will also consider a hosted/subscription service. If you offer a vendor hosted solution you may include separate pricing for this as well. Please distinguish:

**Software Costs**
- Include line item detail, with brief description, of each software component proposed

**Professional Services**
- Provide details of the specific services related to the proposed solution
- Describe available services for converting our existing data to the system proposed
- Discuss any additional, post implementation professional services offered or recommended

**Training and Support**
- Identify training included in proposal and additional training options available

**Hardware**
- Please discuss any hardware required as part of the proposed solution.
- Identify any hardware that Oakton should source directly from the vendor, and the reason for doing so
9. Other

Please list any other key feature or service which you feel distinguishes your company or product, and which you think we should consider in our selection process.

10. Company Profile

Please provide the following information:

a. Company locations
b. Number of years in business
c. Total number of employees
d. Number of developers
e. Number of customer support staff
f. Total number of clients / number of Higher Education clients / Community College clients
g. Primary markets
h. Credentials/resume’s for the proposed project team that will be working on our account.
# Price Page

**Software Costs**  
Include line item detail, with brief description of each software component proposed. Please include initial licensing and ongoing maintenance costs.

<table>
<thead>
<tr>
<th>Description</th>
<th>3 Year Cost</th>
<th>5 Year Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$________</td>
<td>$________</td>
</tr>
<tr>
<td></td>
<td>$________</td>
<td>$________</td>
</tr>
<tr>
<td></td>
<td>$________</td>
<td>$________</td>
</tr>
<tr>
<td></td>
<td>$________</td>
<td>$________</td>
</tr>
<tr>
<td></td>
<td>$________</td>
<td>$________</td>
</tr>
</tbody>
</table>

**Professional Services**

Specific services related to the proposed solution | $________ | $________ |

Services for converting our existing data to the system proposed | $________ | $________ |

Additional, post implementation professional services offered or recommended | $________ | $________ |

**Training and Support**

Training included in proposal | $________ | $________ |

Additional training options available | $________ | $________ |

**Hardware**

Hardware required as part of the proposed solution. | $________ | $________ |

**Integration**

Integration with Ellucian Higher Education Banner SIS (8.X) And Luminis Portal (4.1) | $________ | $________ |

**Total** | $________ | $________ |

Company Name: _______________________________________________________________

Name: ________________________________________________________________________

E-mail: ______________________________________________________________________
STATE OF ILLINOIS )
) SS.
COUNTY OF COOK )

CONTRACTOR'S CERTIFICATION

Pursuant to Illinois Revised Statutes Chapter 38, Article 33E (Public Contracts), the undersigned certifies that he/she is a duly authorized agent of the contractor submitting the attached bid to Community College District 535, Oakton Community College and that said contractor is not barred from bidding on this public contract as a result of a violation of either Section 33E-3 or 33E-4 of said statute.

Signed this __________ day of ____________, 2013.

By: ________________________________
Title: _______________________________
Address: ________________________________

SUBSCRIBED AND SWORN TO before me this _____ day of __________, 2013.

____________________________________
Notary Public

Please return this form with your proposal.