

Requirements	Included in Base Software	Customization Required (w/o extra fees)	Customization Required (w/ extra fees)	Not Included	Comments
General Requirements					
Single-source solution including: records management software and hardware for land records, probate records, vitals, passports, licensing and permits, image to film archival, disaster recovery, support and maintenance and micrographics conversion services.					
Software installation, training, conversion of entire database of indexes and images, and ongoing support is provided by the prime responder.					
Proven track record of successful implementations and ongoing maintenance and support. Must provide a minimum of 3 references from offices that receive similar services as herein listed					
All-inclusive support and maintenance package is preferred to include: software upgrades, enhancements, training on an as needed basis, state mandated changes, reports, bug fixes and trouble-shooting.					
Pricing is to cover all current users and any additional users which may be added in the future throughout the duration of the contract.					
All Services provided must be performed by bidding company and without using a sub-contractor					
User Interface					
System must be Windows-based, menu- and table-driven, and must provide for online prompts where appropriate. The user must be able to quickly access screens using point and click, keyboard or hotkeys.					
The system utilizes on-line, drop-down lists for all valid values for each validated field.					

The system provides immediate transfer of values from "pop up" tables to the appropriate field when selected.					
On-line screens proceed directly and automatically to the next appropriate field when data is entered.					
The system has one central module to access all screens and does not require backing out of screens to access a different module.					
System supports cut and paste for copying data between windows.					
The system allows navigation between multiple, related input screens without losing information input on the original (or header) screen.					
The system allows the user to move backward within a menu structure without losing data.					
The system allows user to open multiple screens/windows simultaneously.					
The system stores a list of recent values for each entry and makes them available for selection during the current session.					
The system supports partial queries for data in transactions and records.					
Cross validation edits for data entry can be configured by authorized users or administrators.					
System carries forward user preferences when system upgrades are applied.					
All entry fields that receive date and time values must perform edits and must only accept valid entry.					
All entry fields that have validation from a code table must produce, upon user request, a pick list of code table values, where the user can select the proper value for the field.					
Application software screens must produce messages informing the users of required fields that must receive a value before a screen can be accepted.					

All screens must display progress update messages when the system is executing a process which results in the user screen being disabled.					
The System can allow the user to easily lookup and identify the stage a document is in the recording status such as cashiering, stamping, indexing, verification and/or mail back.					
The system tracks the User ID for each activity performed to provide an audit trail and improve accountability.					
The system stores a list of recent values for each entry and makes them available for selection during the current session.					
The system supports partial queries for data in transactions and records.					
End-user screens contain triggers to load additional data screens automatically based on specific data input.					
End-user screens must have the ability to have a user defined font size or use local system font settings.					
System must provide a keyboard interface for all primary functions. This includes "hot keys" for common tasks.					
System stores user profile preferences for font, colors, column and row location, workspace, etc. and retrieves them automatically when session is initiated.					
System Documentation					
User manuals (on-line and hard copy) will be provided.					
Documentation will include a data element dictionary.					
Documentation must include diagrams for data flow and program flow.					
Documentation must include system backup and recovery procedures.					
System Support					
Toll-free support to be available 24 hours a day, 7 days a week with direct escalation contact information made available to the Town Clerk's designated staff.					

Town may be able to submit requests via email to be automatically logged into a ticketing system.					
Experience and support tiers should be described and include the escalation procedure through support tiers.					
Defined SLA (including at a minimum, time to acknowledge, and time to resolution) by category / severity, including replacement terms on any hardware (i.e.: four hour hardware replacement during business hours)					
Vendor is to have an on-line system in place to track new and working calls incoming from customers which also logs a history of activity associated with the tickets for the Town to access.					
Vendor should be able to provide remote support.					
Software upgrades should not require any Town personnel assistance.					
Application upgrades should be deployed at the server level? Describe how this is done.					
Application Requirements					
General Requirements					
System consists of fully-integrated application modules.					
System is table-driven and gives Town staff ability to change codes for data if necessary.					
System utilizes effective-dated transactions and table updates (either future dated or retroactive) with the ability to specify data edits by type of transaction.					
Business rules are incorporated into the system so that the rules are appropriately applied at the time data is being entered.					
Default application system availability is continuous (i.e., 24 x 7).					
System allows users to navigate backwards or forwards through screens. Within a menu, the user must be able to return to the previous screen or menu.					
System provides a system administration console that is web accessible.					

System provides the ability to allow automatic system numbering or user-defined numbering (with reserved ranges or specific numbers).					
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System provides the ability to prevent duplicate document numbers or reference numbers based on user- specified criteria					
System provides the ability to use alphanumeric characters for documents and other references (i.e., Vendor, Customer).					
System provides the ability to activate or inactivate any master record or validation table entry.					
System provides the ability to validate user-defined codes during on-line entry and have alert attached that will activate other actions.					
System provides the ability to archive and restore inactive records based on user-defined criteria and track history.					
System provides the ability to track data at the detail and summary level.					
System provides the ability to have wildcard or partial searches.					
System provides the ability to default values based on value of another field.					
System provides the ability to override system or user-defined defaults, with appropriate security.					
System provides the ability to apply alerts to any transaction based on any user-defined criteria, with appropriate security.					
System provides the ability to have descriptions on all transactions i.e. account names, department names, purchased item descriptions etc.					
System provides the ability to have department-specific data fields.					
System provides the ability to have user-defined data fields for department use across the Town.					
System provides the ability to provide descriptions for chart of account items, transaction and other codes.					

System provides the ability to capture electronic signatures on required documentation (e.g., signature on a application).					
System provides the ability for secured import/export of data (i.e., Open Data Base Connectivity {ODBC) compliant and/or other generally accepted formats) native to the application.					
System provides an export facility that supports major standard formats, including but not limited CSV, Comma-delimited, TXT, XML, DIF, RTF, etc...					
System includes eRecording capabilities when approved by Rhode Island Legislation.					
System provides the ability to create form letters or forms.					
System provides the ability to capture imaging documents and associate with appropriate master record or transaction.					
System provides the ability to void or cancel documents or transactions at any process level with user-defined reason codes and approvals or with standard reason codes.					
System provides the ability to make corrections and modifications after initial entry of information with an audit trail to track these changes.					
System provides the ability to provide transaction templates for recurring document entry or processing, which includes autofill capability.					
System provides the ability to copy a form in order to create a new form of the same type.					
System provides the ability to have a user-defined number of years of data available in the system.					
System provides the ability to not exit any document or screen without prompting the user to save changes.					
System provides the ability to prevent transactions that reference a record in an "inactive" status and the ability to override the prevention.					

System provides the ability to process mass redactions and/or deletions to historical and dayforward records (for records retention or in the event of a statute requiring redaction of certain information) via a user interface.					
System provides the ability to post messages on the system login page for internal staff and for public users.					
System must provide capability to “drill down”, using point-and-click to view detail supporting summary information presented from online search capability, and provide the ability to enter adjustments at the detail level without leaving application.					
System design must eliminate the input of redundant data across system modules.					
System must provide an audit trail of all updates to the database based on user-defined criteria for a user-definable retention period. At a minimum, the system must record the date of update, user ID, and field value before and after update.					
System must represent “date” and “time” fields in a format that is not ambiguous, particularly with respect to century change.					
System must provide ability to “lock” records so that multiple users cannot perform updates at the same time, or have ability to allow simultaneous update of same record by at least two users. The system must notify users when lockout occurs and permit other processing rather than suspend all activity due to the locked resource.					
System must use relational database technology, and provide standard update and query capability.					
Programmatic control of the process flow to prevent data from being processed in the wrong sequence					
Processing cycles completed in a logical and prescribed order					

Updating of tables/files upon completion of a logical unit of work					
System must provide for defaults to be in place in fields wherever possible or practical.					
System provides a consistent GUI across modules to assist in the user's learning and ongoing system use, and improve productivity.					
System may provide edits to ensure duplicate document numbers are not allowed based on user-defined parameters.					
System may provide the use of program "Fx" function keys to assist in expediting data entry and inquiry.					
System may allow user with appropriate security to access multiple modules without exiting system (i.e. user would be able to access the Purchasing module and the Accounting module and toggle back and forth between the two).					
System may provide the ability to (distribute) replicate data to a reports server that can be accessed through the internet for reporting and inquiry purposes.					
The user must have the ability to operate application software from a menu system or dashboard.					
All date fields must be century compliant, accepting four digit year values.					
All Official Records documents will be imaged and linked to the Official Records index.					
Ability to system generate a certification form for certified copies of scanned images, as well as a certification stamp on every page of the document.					

<p>A Document Type code table must exist that includes all document types recorded. A system supervisor must have the ability to add codes to this table. The Document Type code table must also contain flags that instruct the Recording screen to require entry of direct and reverse party information.</p>					
<p>In order to avoid redundant data entry, data entered by cashiers will carry forward and be available for the indexing process. (i.e., Recording Fees, Grantor, Grantee, addresses, etc.)</p>					
<p>All numbers assigned by the system will be unique (i.e., no duplication of instrument number, receipt numbers, registrar file numbers, etc.).</p>					
<p>Image must be linked by direct reference to each field indexed.</p>					
<p>System must use the USPS Zip Code service for automatic insertion of city, Town and state by only entering a valid zip code.</p>					
<p>The software must have a security flag to allow certain users to update data on the Official Records Index.</p>					
<p>The document record must store an optional return mailing address for documents that must be returned by mail.</p>					
<p>The document record will contain a flag field that denotes method of returning a document (mail, in-person, electronic).</p>					
<p>The system will produce mailing labels for documents that must be mailed back to the customer. Further the system must provide the capability to print single labels as well as a series of labels on demand.</p>					
<p>All Receipt records must be linked to the document records for which they were generated.</p>					
<p>All document records must be linked to the Receipt records generated for them.</p>					

Users must have the ability to query/print a report on a real-time basis that lists the number of new records added to the database.					
Users must have the ability to print a daily balancing report.					
Users must have the ability to print a report that lists an alphabetical index by document number and name.					
When printing reports, users must be able to select the type of output, the printer, number of copies, and have the option to cancel the print request.					
Ability to set security in the system using roles or responsibilities managers can easily maintain.					
Ability to prompt user to change the password.					
Ability to provide multiple levels of password security with identification of the specific operator executing a transaction and lockout to prevent unauthorized fees, deletions, and searches.					
System provides externally definable security to restrict access by user					
Security modules provide automatic password deactivation and/or deletion (based on elapsed time or inactivity) or other rules.					
The application security provides the ability to force users to reset their password upon login or based on a predetermined time period.					
Users are unable to alter instrument numbers generated by the system.					
Automatic User ID lockout for user-specified time period after three (3)-attempted accesses with incorrect password within an hour.					
Security Administrator can determine the last time that a particular User ID accessed the system.					
Document Workflow					
System supports user-defined workflow for any system event or transaction.					

System supports batch scanning of multiple documents at one time. The following batch scan modes must all be supported. Identify documents by barcodes applied to document, scan all documents in a transaction in a single batch or manually identify a set of documents to scan in a batch. This is in addition to providing standard single scan options.					
Items awaiting approval must go to a central queue for that stage where staff can retrieve work.					
System must allow reviewer to approve the document and automatically forward it to the next appropriate level as determined by the established route for the document.					
System must allow reviewer to reject the document and log reason(s) for disapproval.					
System must allow reviewer to suspend processing.					
System must provide audit trail of electronic approvals, including approval date, time, ID, and action.					
System supports multiple workflows dependent on content type.					
System must provide reviewer with a queue window including a scrollable list of documents that have been forwarded for approval.					
System must allow document to automatically post if it has received all required approvals in its approval path.					
System allows user to attach notes to content items within the workflow and stores these notes with user ID and date/time stamp.					
Workflows can be designated as either 'informational' or 'action (such as approval) required'.					
System may allow for workflow rules, roles, and routings to be easily changed by end users responsible for maintaining them without intervention of technical staff.					
System provides tools to support workflow analysis for workflow process improvement.					

Workflow can be designed to allow simultaneous actions or can require consecutive actions, as defined by authorized administrator.					
System provides a queue for each user with workflow items to be reviewed.					
System may provide online inquiry to the status and location of a specific document, including documents that have been disposed to an archived status or other storage locations until purged.					
System displays status of workflow transactions so participants can determine where actions are delayed.					
System tracks workflow approvals and rejections.					
Supports user-defined transaction status, including approved, rejected, pending, held.					
Workflow destination may be defined as specific users or class of users or by using some other user-defined criteria.					
System automatically notifies users (via system alert) when items in their queue have gone unprocessed for a user-defined period of time.					
The document data records must contain fully auditable tracking information for the full processing cycle of a document (i.e.: Recorded, Scanned, Indexed, Verified, Mailed Back).					
The Document Workflow select list must present documents with Status Codes for each step in the processing cycle.					
Document Status levels must be achieved automatically by the completion of a particular process, or by the user updating a flag field when a manual procedure is completed.					

Users must be able to select a document from the Workflow queue to work within any of the workflow screens.					
Document Retrieval					
The system must provide an efficient means of document retrieval and rapid transition from page to page, and image to image.					
All image applications must include both simultaneous thumbnail and current image views. The user must be able to simultaneously view at a minimum the first 4 thumbnail pages of a document and the current selected page at full view.					
The system must provide a user choice for window set up. This shall include all image centric applications including scanning, indexing, verification, and public access. The user must be able to on-the-fly change their view including movement of thumbnail windows and the main image/current image window.					
The system must allow a scanned document to be rotated, moved on the screen and scrolled page by page.					
The system must provide for a magnifying glass or zoom function.					
The system must have the ability to handle multiple, simultaneous requests for an imaged document, and for multiple imaged documents.					
The user must have the ability to scroll through a displayed image that is too large to fit on the workstation monitor.					
The users must have access to search and select lists.					
Users must have the ability to access each index and image in the system.					
Document Printing					
Users must be able to reproduce documents on a laser printer.					

The document copies must be equivalent in appearance to the digital images displayed on the screen.					
Users must be able to select multiple documents for copying, and queue them on a printer.					
Users must be able to print in a reduced scale format.					
Users must be able to specify a page range and individual pages for a given document.					
Reporting					
All reports must have a standard header.					
Reports are to include: standard reports, user reports, financial reports, audit reports, state mandated reports and custom reports. Include samples for review.					
All reports must produce a selection criteria page at the beginning of the report.					
All reports must contain a totals page at the end of the report.					
Any report that does not find any records based upon the given selection criteria will print a message on the last page of the report which reads "no records found".					
Provide for user-definable, user-friendly report writers and formatters on user defined schedule basis.					
Ability to have the user work on the workstation while the report writer system is actively compiling or printing a report (e.g. No system driven "lock out").					
Ability to view all standard and ad-hoc reports/queries online at the end users workstation prior to printing hardcopy (on-demand/real time).					
System must have the ability to generate, print, and produce all required reports on demand/real-time to local printers and network printers.					
Delivered (standard) report format is consistent with statutes.					
Ability to export reports in various formats (i.e. MS Word, MS Excel, .CSV, PDF, etc.)					

Ability to produce trend reports including individual performance statistics.					
Ability to produce reports stating the number of pages scanned by user, location, and/or department for any given timeframe.					
Ability to produce exception reports reflecting void transactions or fees expected vs. fees collected for the requested time period.					
Ability to produce reports listing all users who accessed the system on a daily basis including entry and exit times, user identification, company name (for external users).					
The system has the ability to generate a list of applicants who applied for a marriage license or Assumed Names that include the applicant's name, document number, file date, etc...					
Ability to produce reports by location.					
Provide reports that allow Town Clerk staff to monitor and manage incoming volumes and staff production.					
System is to report on employee productivity by role and display graphical real-time dashboard views for supervisors to access at any time.					
System must provide auditing reports to track efficiency and error rates for all clerks.					
Cashiering					
All transactions will be processed through one common cashiering system including certified copy transactions at Town substations.					
User can easily recognize, diagnose, and recover from errors.					
System has the ability to produce month-end accruals for funds receipted prior to month end and deposited in the following month.					
Ability to purge or retain records in history files according to Town's established retention policy.					

The new system must provide an application module dedicated to the processing of customer payments for receipts and invoices.					
Users must have an appropriate security to perform cashiering functions.					
Cashier workstations must have a cash drawer, which is opened programmatically or by manual key.					
The system must support receipt of payment in cash (calculate change due), checks, credit cards, escrow accounts and accounts receivable.					
Credit card payments can be interfaced with the Town's credit card solution.					
System is flexible handling credit card convenience fee charges i.e., flat rate, percentage of fee, etc...					
Vendor must provide an integrated e-Commerce function including a hosted service to allow for all credit card payments at the counter or through remote means for copies, certifications, etc. Must be PCI compliant.					
e-Commerce function must be fully integrated with the proposed application and allow for acceptance of all major credit cards including American Express, Discover, Visa, MasterCard, etc.					
The system must support the recording of multiple documents with a single payment consisting of any combination) of payment methods.					
The system must provide for an integrated rejection function. The rejection function must allow an authorized user to reject a document (e.g., counter, mail and e-Recorded).					

<p>The rejection function must provide for a system generated letter where pre-determined parameters can be automatically populated (e.g., name and address), as well as options boxes for reasons of rejection (e.g., no signature). Must be able to scan and attach copies of the rejected document and/or form of payment.</p>					
<p>The rejection function must provide for automated letter generation and printing and an automatic email function as appropriate.</p>					
<p>The system must provide the capability to automatically calculate fees based on user-maintained tables.</p>					
<p>The system must allow the use of a common customer table by customer name & customer number (code table), and must allow the user to add a new customer name which can be added to the frequent customer table.</p>					
<p>The system must automatically assign the following information for each recorded document: Instrument number, recording date, time, and volume & page.</p>					
<p>Upon payment, the system will create Payment Detail records which will contain the General Ledger accounts, amount paid, receipt/invoice number paid, tender type, and check number. All Payment Detail records will contain the current date, upon which the payment was made. This information will be interfaced into the Town cashiering system.</p>					
<p>Users must have the ability to print a Daily Balancing Report containing totals for funds received, and sorted by each tender type, broken down by teller/cash drawer. Totals must also be given for General Ledger categories.</p>					
<p>A validation printer should be available to each Cashier/Recorder to validate the receipt/invoice and check(s) used for payment and endorse the document.</p>					

Support cash drawer workstations with the following: (1) Keyboard (2) Mouse (3) Attached Scanner (4) Image capable monitor (5) Financial Slip Printer (6) Laser Printer (7) Locking Cash Drawer (8) Label Printer.					
Support cashiering options in the following flows: (1) Cashiering at the counter for walkups (2) Batch cashiering for mail and title companies (3) Cashiering concurrent with scanning (4) Cashiering with scanning at a later time.					
System must have the ability to quickly add a user specified number of documents to a transaction by cloning any existing document or a document in the current transaction.					
System must be able to define, per document type, fields to be copied and/or mapped during clone operation.					
The system automates overage processing for surplus/refunds.					
The system provides the ability to produce electronic rejection notices for documents that do not meet recording requirements. System logs will be available to track rejections and reports will summarize rejections by reason, customer type, and quantities over time. Reason Codes are maintained by the Town. The System should allow for attaching a scanned copy of the document to rejection for reference purposes.					
The Town Clerk's fee schedule is table driven and access is restricted.					
The System must track the history of changes made to the fee schedule including: time of the change, user that made the change, previous value, workstation the change was made from, and statute or order enabling the change.					
Real Property cashiering prompts the user for a minimum of Document Type, Number of Pages, plus other items in order to calculate the fee.					

During Real Property cashiering optional fields can be entered and any other additional information as related to certain documents.					
System will automatically generate an e-mail receipt to be sent to customers that include, at a minimum, instrument number, transaction number, date and time recorded, document number, associated fees and payments, customer name (if entered), first party1 (if entered), first party2 (if entered), account balance (if account is used).					
The system creates two labels or electronic stamps for each document. The first label/stamp is the document stamp and contains a minimum of Instrument number, number of pages, and bar code to be placed at the head of the document. The second will contain "Filed and Recorded," fee, date/time of filing, cashier ID and other information as directed by statute. The "Filed and Recorded" label/stamp will include the Town Clerk's full name.					
The ability for the system to electronically tag scanned documents with the following information. First, an electronic document stamp is created and must contain the Instrument number, volume and page number, number of pages, and bar code to be placed at the head of the document. Second, an electronic stamp is generated on an additional page attached to the end of the document containing "Filed and Recorded", fee, date/time of filing, cashier ID and other information as directed by statute. The "Filed and Recorded" label/stamp will include the Town Clerk's full name.					
The system has the ability to produce a courtesy copy label/stamp.					
The cashiering system will allow entry of document return method, i.e. Walk-in Mail.					
System must support the suspension of a transaction that can be later recalled and continued.					

The system calculates convenience fee due for credit card transactions and adds to amount due.					
Instrument numbers are assigned sequentially at the end of the transaction when the payment is applied.					
Cashiers may correct errors before the transaction is final.					
The system endorses the check with information from a code table as well other receipt information such as receipt number.					
The system uses shortcut keys to speed data entry for payment type and document type.					
Upon payment, the system calculates change due to customer for cash transactions.					
The system supports high volume and rapid and efficient entry of transactions.					
The system provides for a batch recording function to automatically assign instrument numbers and index redundant information.					
The system will distribute the fees to the appropriate General Ledger accounts based on user defined tables.					
Ability to require supervisor approval for certain documents recorded for no fee.					
Ability to process non-filing fees, such as bank charges and copy charges.					
Cashiering must provide the ability to simultaneously view all information within a single cashiering window including document recording information, auto-indexing information, non-recording fees (e.g., copies, certifications, etc.) and a transaction summary screen.					
Support the creation of both a 'filed by' and 'returned to' index for recorded documents.					
System must support full document indexing within the cashiering application.					

Payment/Receipting					
Ability to allocated costs received as mandated by State statutes.					
Fees assessed by file date.					
Accept and apply one payment across several record filings for one receipt.					
The system has the ability to cashier multi-tender transactions.					
Accept and apply credit card payments through an integrated e-Commerce credit card solution or through the Town's chosen vendor and record authorization number and expiration date.					
The system provides the ability to generate a report listing all uncollectible returned checks so that appropriate general ledger entries can be made to write off the balances and reduce revenue.					
The system must include an application module that allows the user to produce receipts for payment of customer fees and other monetary collections.					
All date fields used in the Receipts application must be century compliant and able to accurately process dates using a four-digit year.					
An official receipt may be printed that shows the information entered by the clerk and calculated by the system. The receipt must show the following information in clear and legible print: Receipt number, recorded date and time, Town Clerk's full name, instrument number, number of pages, fee amounts, total fee, book & page, deputy clerk's initials or code, etc.					
The official receipt must print on receipt roll paper or letter size paper.					

All receipts generated must be linked in the system's database to the application data records by key values. Subsequently, all application records must be linked to the receipts that are generated on their behalf.					
A system user will require a specific Security Profile setting in order to access and execute this software module.					
A Receipt can be generated which will establish a Debit account for approved customers. The Debit amount on the Receipt will update the customer's code table record with that amount in real-time.					
The Receipt software must inform the user when a customer has a debit balance for which to pay for services.					
The Receipt software must inform the user when a customer's debit amount balance does not contain enough funds for a particular transaction.					
A Receipt Number must be automatically assigned by the system for all receipts generated.					
The Receipt generation screen will provide for the entry of unlimited line items, and will allow the user to scroll back and forth through the line items while keeping a running total display bar at the bottom of the screen.					
The Receipt generation screen will allow for the addition/insertion of a new line item on the list while reflecting the total impact of the modifications on the bottom total display bar.					
The Receipt generation screen will allow for the deletion of any of the line items on the list while reflecting the total impact of the modifications on the bottom total display bar.					
A receipt is generated for full payment only, and the system will not allow partial payment for any receipt.					
The Receipts application must allow for a receipt to be adjusted and/or voided by an authorized user.					
The system must maintain an audit of adjusted receipts and provide report output for this audit information.					

Receipts adjusted involving Debit accounts will be reflected on the Debit Account Statement.					
The system allows entry of a comment on the receipt that is for internal user only.					
System can reprint receipts. Reprinted receipts have "Duplicate" printed on the receipt.					
Ability to prevent issuance of a negative receipt.					
Ability to reprint on-demand and system generated receipts, bar-code labels or reports.					
System has the ability to use a check scanner-validator machine and store images of the check with the transaction.					
The system can be configured to use stamps and/or labels using any combination of endorsing printers, label printers, or other standard printers.					
Ability to print image of the check on the receipt.					
System must have the ability to email receipts to specified email address. Emails will contain the receipt as a PDF attachment and may optionally attach recorded images.					
System provides the option to turn off hard-copy receipt printing.					
Daily Cashiering Close Out & Deposit					
Ability to prevent updates and corrections that result in negative total for any bank code at the end of the day closeout.					
Ability to produce separate/distinct daily deposit summaries for cash, credit cards, checks including overages and shortages.					
Ability to change payment type (cash, check, electronic) with audit trail.					
System has the ability to create separate daily deposits by location.					
Financial Reporting					

System must provide fully integrated financial reconciliation for end of day balancing by user, by location and as a whole.					
Ability to produce lists (by date range) of any type of financial transactions – all receipts, receipts by type, all disbursements, disbursements by type, void checks, non-cash transactions.					
Upon cashier close out, the cashiering station and by cashier will produce a recap report highlighting the activity for the day. This report will include fees received by payment type, GL account distribution, fees collected by document type, instrument number ranges, voids, and adjustment transactions.					
Ability to produce an audit report that identifies the employee making entry.					
The system has the ability to reconcile the number of print queue documents to the cash drawer close out.					
Ability to generate a daily cashier transaction report and a summary report for all cashier stations and cashiers by location.					
System support should include addition and modification of reports on an as needed basis at no additional cost.					
System produces a report that lists all checks received for a specified time period that lists the checks by cashier (check register).					
System produces a summary report that includes the total GL fund account distribution (dividing the daily totals into each fee type, and then tender type within each fund code). Ability to accurately report multi-tender transactions on the report. This is our current General Ledger Fee Summary Report. NOTE: This report allocates charges related to escrow accounts into the appropriate fee, fund, and tender codes.					

System produces a report that provides all the money collected for a specified period of time for e-filed documents divided by tender type, and that lists the documents filed by customer (and that includes a total for each customer, and a total for the tender type).					
System produces a refund log that includes the customers address and the amount of the refund.					
System produces a daily cash report for each cashier that lists the totals for each tender type					
System produces a transaction detail report for each cashier that lists all the details related to each transaction (document #, type of document, name, of client, etc.)					
System produces a report that lists the voids and edits for a specific period of time					
System produces a report that lists all multi-tender transactions (cash and check, escrow account and check, etc...)					
System produces a report for each tender type that lists all the transactions for the tender type					
Delivered (standard) report to printout totals daily, weekly, monthly, quarterly and calendar and fiscal year-to-date totals of recording fees collected and distributed.					
Receipt Adjustments					
Receipt adjustments do not alter the original receipt date.					
Ability to void a receipt by authorized persons maintaining an audit trail of the old receipt, user name, and date of void.					
Void transactions require supervisory override.					
Voided receipt is tied to original receipt.					
System must require comments and note reasons for voids.					
Ability to generate a printed receipt marked with the word "void".					
Ability to limit receipt voiding capability to the location that issued the original receipt.					

Ability to re-classify payment type (cash, check, electronic) with audit trail.					
Ability to make a correction by supervisory level only while maintaining audit trail and effective dates.					
Ability to make correction to fee codes without affecting amount total on the receipt with audit trail.					
Ability to control access to corrections to security with audit trail.					
Accounts Receivable					
System tracks escrow account balances and produces invoices.					
The receipt will show the customer's remaining balance if they have an escrow account.					
The system has the ability to refund total balance in an escrow account.					
Support monthly invoicing to public users who have accounts via system generated email.					
Support accounts receivable for on demand invoicing: (1) Records receipt of funds by account (2) Allocate fees to appropriate fund accounts (3) Integrate with daily deposit transactions (4) Print duplicate invoices as required.					
System should provide ability to run statements for Debit Accounts on demand for any date or date range.					
System should provide ability to run statements for escrow accounts based on the following criteria: (1) active/inactive, (2) active during the reporting period, and (3) dollar amount threshold.					
Support changing account status to Inactive for any reason and prevent use of the account until reactivated.					
The system needs the ability to manage charge accounts and produce periodic invoices (i.e. government agencies).					
Revenue is recognized for charge accounts upon payment of invoices.					

The system allocated payments from escrow accounts into the appropriate fee, fund, and tender code.					
The system will allow partial payments on charge account invoices.					
Document Endorsement					
A label printer shall endorse each document with filing information.					
System must provide functionality to electronically certify a document. The electronic certification should be provided at the counter or made as a request remotely over the Internet.					
System must provide for an automated and complete audit history of all certifications of records.					
System must provide a way to search for and track the number of times a document has been certified.					
Labels/stamps include appropriate information to facilitate scanning by using a bar code.					
Document Scanning					
All images will be written to the system hard disks.					
Provide immediate on-screen validation for scanned document images.					
Maintain a count of pages at scanning for verification to recording pages.					
Support letter and legal document sizes.					
Provide 300 dpi resolution.					
Provide operator adjustable quality controls (i.e. contrast) that can be adjusted before the image is written to disk.					
Display the scanned image and the index screen on dual monitors simultaneously.					
Support duplex scanning.					
Allow operator to rescan images without storing the original image scanned.					
Compress images using CCITT Group 4 Multi-Page Tiffs.					

Ability to view scanned documents immediately after cashiering with limited indexing provided through cashiering system (i.e. instrument number, date filed, document type, and volume/page). Scanned document should be automatically tagged or connected with the index information.					
Ability to auto generate single page no fee documents in the scanning application.					
Scanning routine compares the number of pages scanned versus the number of pages cashiered and produces an exception report.					
Scanning routine compares instrument numbers scanned versus instrument numbers cashiered and produces an exception report for any missing instrument numbers.					
Scanning system provides capability for quality control review of images on-line with the ability to replace bad images as needed.					
Scanning device has auto-page size detection and can process both letter and legal sized paper in mixed batches.					
Scanning device has double-sided capabilities and will eliminate images of blank pages.					
Scanning device uses bar code as separator sheet.					
Images can be categorized by status (i.e. not verified, verified, indexed, and exception).					
Scanners will be available to cashiers to enable instant return of filed documents. These scanners will have built in system redundancy to protect from loss of data and real-time backups.					
The system must retain a separate redacted copy with redacted content permanently removed for public use and an un-redacted copy for office use. Describe how your proposed system satisfies these requirements					

The system must include both the automatic redaction of Social Security Numbers and the functionality to manually redact Social Security Numbers or other sensitive information during the indexing process. The redaction process cannot alter the original document.					
System has both manual and automated redaction capabilities.					
Record Indexing					
The system shall support indexing of the following data: Grantor/Grantee Names, Document Number, Volume & Page Numbers, Executed Date, Method of Return, Recorded Date and Time, Document Type, Legal Description, Property Address, Return Address, Related Document, Amount, and Abstract, Survey, Plat Volume & Page, and comment window.					
Users must have the ability to pick a document from the work queue that requires indexing and/or verification.					
Users must be able to perform re-key verification, with the capability to change to sight verification, of the names on the same document.					
System supervisors must be able to select which fields are required to be re-keyed.					
A supervisor must make modifications to fields other than party names and legal descriptions once the document has been marked Index Verified.					
Auto-Redaction must have the capability to run in either automatic mode or manual quality assurance mode. Please describe.					
Allow for insertions of annotations on a page. The annotation should allow for user defined text.					
Allow for the insertions or automatic generation of watermarks.					

A system supervisor must have the ability to modify a user's security profile to allow for making corrections on documents.					
The verifying screen must look the same as the indexing screen.					
If a re-keyed field does not match the corresponding indexed field, the user must have the ability to select one and delete the other.					
Support at a minimum the following index fields: (1) Unique file number/instrument number (2) Type of document (3) Number of pages (4) Date filed (5) Grantor (multiple) (6) Grantee (multiple) (7) Recording fee (8) Legal description (multiple) (9) Related document (link) (10) Volume and Page.					
Support initial index completion at the time of recording with the option of index expansion later.					
Display all initially indexed information at the time of index expansion (no duplication of entry).					
Support multiple grantor/grantee names per document..					
Support multiple legal descriptions per document.					
Provide the operator with an option for mouse, function key and command entries.					
Support modification of the previously entered data with the appropriate security level for modification.					
Provide error correction report for any re-keyed fields.					
Support at a minimum the following index fields for Assumed Names records: (1) Instrument number, (2) file date, (3) fee, (4) record type, (5) business name, (6) business address, (7) owner names, and (8) owner address.					
The system has some method of OCR for field level and/or full text indexing of trade names.					

All services described below must be completed in a single relational database that is owned by the Town Clerk's Office. Work may not be transmitted between or among multiple databases.					
The ability to run an exception report on-site by batch and be notified of individual document/page exceptions automatically.					
OCR/ICR Capability					
The system must utilize OCR tcehnology for use in manual and auto-indexing functionality.					
All OCR capabilites must be fully integrated and executed from within primary application.					
OCR capabilities must include the ability to "lasso" content on the document image directly into the document index fields.					
OCR capabilities must include the ability to normalize lassoed content to meet client indexing requirements.					
OCR capabilities must include the ability to identify data based on field type.					
Auto-indexing feature in the system should have the capability to capture data from all document types.					
Auto-indexing feature must support form-based and non-form based documents.					
Auto-indexing feature must have the capability to capture data from all data fields or only specific data fields.					
Records Search Select List					
All applications, including Receipts, must have a name/data search and comprehensive select list capability.					
Search utilities and selection lists must have the same visual and interactive functionality across all applications.					
The search screens (in house and public access) used to create a select list of existing records must have the capability to locate records by all indexed fields.					

The search screens must give access to the database records by Last Name, First Name, and all other appropriate data items for each application.					
The search screen must clear automatically after search results are displayed.					
While the system is performing a search, the screen will clearly inform the user that the system is working to find the desired records, and a percentage progress update statistic will be displayed on the screen. If a search is too broad, the user must be informed to refine the search criteria.					
The search screen will give the user the ability to select the sorting order that will be used to present the selection list.					
Search results grid will have the ability to drag and drop columns for filtering purposes.					
The select list will display as many records as the user defines.					
The user will have the ability to scroll or page forward and backward through the selection list.					
The user will be able to select a record from the selection list by keyboard access or by mouse control.					
A record detail button will be available when the user has highlighted a record from the selection list. When the Record Detail button is pressed, further detail for that record will be displayed. When the user is finished viewing the further details screen, they can return to the selection list.					
When a select list is displayed, the user will have the capability to cancel the list and perform a new search.					
Land Evidence					
System will provide full support to cashier, index, image and search all land evidence document types.					
System will provide full support for maps including cashing, indexing, imaging and searching.					

System will provide monthly and yearly grantor and grantee index per client specifications and layout.					
Monthly and yearly indexes must be provide electroincally as well as in a printed and binded format.					
System will provide mechanism to add new document types via clone of existing document type.					
Probate					
System must fully support all probate functions of the Clerk's office.					
System must support ability to create probate cases capturing all relevant information including but not limited to Decedent, Personal Reprntatives, Attorneys, Date of Death.					
System must have ability to file documents to any existing probate case.					
System must provide access to probate cases and filings via public access system. Access to probate searching and data will be controlled by user permissions.					
System must provide ability to produce a detailed docket report include all relevant filing and case information.					
Dog Licensing					
System must provide functionality to file and cashier new dog licenses capturing all relevant information required by the Clerk's office.					
System must be able to renew existing licenses					
System must be able to generate dog license for printing based on Clerk's office specifications.					
System must have ability to identify and notify staff of expiring licenses.					
System must be able to generate expiration notification letters.					

System must be able to automate expiration notification process by automatically identifying expiring licenses, generating expiration letter and optionally email the expiration letter directly to the owner.					
Vital Statistics - Death					
The system has the ability to generate a certified copy of a death certificate by extracting index information and automatically completing a prescribed certificate form that meets all the rules and requirements of the State and Town.					
When a certified copy is issued for a death record, the system must maintain a count of copies issued, requestor information and sequential number of each certificate issued.					
Authorized users must have the ability to amend the index with option of keeping the original name and amending it, or expunging the original name.					
The death index detail must track activity for each user action including creation, modification, scanning, and copy creation.					
The user must have the ability to flag the death record with an indicator that the record has been locked by the State Registrar, Fetal Death, or that the record is a delayed death.					
The user must have the ability to view the age of the record to determine public accessibility.					
Ability to make modifications to the verified index must be restricted to the system supervisor only.					
Ability to make modifications to the verified document image must be restricted to the system supervisor only.					
System includes ability to store scanned images of death certificates.					
System includes the following safety features: locking features, and expungement.					

System provides the ability to produce and track electronic rejection letters for death certificates that do not meet filing requirements or for certified copy requests from persons not eligible to receive copies.					
System provides the ability to track security paper issued or voided.					
Scanning application checks for missing registrar file numbers and produces an exception report.					
System provides the ability to create the death certificate index.					
The system has some method of OCR for field level and/or full text indexing of death certificates.					
The system has the ability to scan and track burial transits and purge according to Town retention schedule.					
Support the following index fields for death records: (1) Full name of deceased (last, middle, first), (2) date deceased, (3) sex, (4) race, (5) age, (6) volume, (7) page, (8) amendment volume, (9) amendment page, (10) date of birth, (11) place of death, (12) residence location, (13) cause of death, (14) registrar file number, etc...					
Vital Statistics - Marriage					
The system provides the capability for online completion of a marriage license application. The application is sent to a queue for processing by clerk without re-entering data.					
All data entered into the marriage application will be carried forward and become the index for the marriage license.					
The user must have the ability to add comments to the marriage record for internal user only.					
The user must have the ability to print the marriage license form from the screen without re-entering data.					

The system must automatically produce and require completion of a Parental Consent form if one or both of the applicants is a minor. The system must verify completion through the use of OCR.					
The system must calculate the age of the applicant based on the date of birth entered for that applicant. Additionally, the system will produce an automatic notification if a Parental Consent form is required.					
Ability to make modifications to the verified index must be restricted to the system supervisor only.					
Ability to make modifications to the verified document image must be restricted to the system supervisor only.					
The user must have the ability to produce a printed informal marriage license form in a format that meets the State/Town requirements.					
The user must have the ability to print the informal marriage license form from the screen without re-entering data.					
The system needs the ability to process all types of marriage license applications (i.e. formal, informal, minor, proxy) and automatically notify user of associated forms (i.e. minor consent forms, hostile fire zone forms, 72-hour waiver form, etc.) as designated by State statutes.					
All required forms are system generated (i.e. 72- Hour Waiver, Affidavit of Absent Applicant, parental consent, etc.)					
Ability to print marriage application data on a pre-printed marriage license form.					
The system should provide the ability to enter a separate "mail to" address for the marriage license. This address can be different than the bride or grooms' addresses.					
The system has the ability to scan and index returned marriage licenses.					

The system provides the ability to update the status of a marriage license from “issued” to “returned” add the date of marriage and Town of marriage to the record without duplicate entry.					
The index and scanned images of the license are available on-line to the public.					
The system has the ability to generate a duplicate marriage license by extracting index information and automatically completing a form that is printed on special stock paper.					
The system will track turnaround times in Vital Statistics based on date of event and date of mailing to the State.					
Support the following index fields for marriage records: (1) Instrument number, (2) record type, (3) volume, (4) page, (5) fee, (6) application date, (7) license date, (8) husband full name and (9) wife full name, (10) expiration date, (11) date of marriage.					
System has the ability to scan and attach the image of addendum material to a marriage application or recorded marriage license. Must be able to limit certain attachments to internal use only.					
Public Inquiry/Research					
The system must include a Public Inquiry application that integrates data records and digital images based on State Statutes.					
Public Inquiry screens must be designed for ease of use by any individual of the public and the screens must be presented with clear and concise instructions. Must meet standard ADA requirements.					
Public Inquiry screens must include an alphabetical index listing which Names, Dates, Instrument Numbers, Volume and Page Numbers, and any other relevant information pertaining to the area being searched.					
The Public Inquiry screens must inform the user when the system is working to gather data records.					

The Public Inquiry System must have the ability to search other spellings and words that sound like the search terms (i.e. Gonzales and Gonzalez, Eric and Erik, etc.).					
The Public Inquiry screens must inform the user when a selected set of search criteria has not produced any records.					
All search fields must have inclusive range capability. Example: Date range 01/01/2000 through 05/31/2003.					
A public user must have the ability to select from a drop down menu the record type (i.e. Official Public Records, Birth, Death, Marriage, etc.) which triggers the appropriate search requirements to appear below.					
The user must have the ability to re-sort the index listing by any of the columnar heading tabs at the top of the list. Both ascending and descending sorts will be offered.					
The user will be able to select an index item and display the detail data records that are related to that item.					
The user will be able to select an index item and display the digital images related to that index item.					
The image viewer will contain capabilities to scroll left to right and top to bottom.					
The image viewer will contain the capability to zoom in and out of any part of the image.					
The image viewer will contain the capability to allow the user to re-size the image displayed to the largest possible viewing size.					
The image viewer will have the capability to allow the user to rotate the image left or right, a full three hundred sixty (360) degrees.					
The inquiry user must have the ability to order copies of data records or digital images via on-line services or to pick up at the Town Clerk's research counter.					

As the public user chooses records and images to print, a running total of all copy work fees (Plain or Certified) incurred will be displayed on the screen to inform the user of the total cost.					
Public workstation provides ability for direct payment via credit card and printing, or for copy work to be sent to a print queue for clerk cashiering and processing.					
The clerk will have the ability to print receipts for the copy work selected by the public.					
The clerk will have the ability to release selected copy work for printing or to delete said copy work, if the customer cancels the order.					
Display full image and full index windows on the public workstation simultaneously.					
Support multiple image windows.					
Print cover sheet for image requests initiated from Town Clerk's public workstations					
Print search results list, if requested by the user.					
Documents held in print queues will not be released for printing by the system until payment is processed the payment.					
Customers at public access terminals will have the ability to select pages of documents and send them directly to a print queue. Customers do not have to print the entire document.					
Internet customers have the ability to research public records and print copies (Plain and Certified). System has the ability to process online payment.					
Ability to select multiple records and send to print without having to open and view each image. (both online and on-site research areas)					
Ability to sort search screens or limit searches by parameters.					

Ability to filter documents for review to further refine a search. System must include option to un-filter to return to the original result set.					
Ability to select specific pages to print versus whole document in one step (e.g., print pages 1,3 and 10)					
Ability to provide on-line access to index and images.					
Ability for customers to send print requests to print queue with identifying information.					
System calculates fees due based on the number of pages printed and the number of certified copies issued.					
The system tracks number of pages printed and fees for plain and certified copies on the receipt. In addition, the receipt may include references to instrument number or volume/page printed.					
Trade Names					
Ability to have public workstations for customers to research registered trade names.					
The system provides the ability to download and print trade name applications from the internet.					
The system provides the ability to process an Trade Name Application and associated forms.					
The system uses OCR to populate the database when possible.					
The system performs auto-indexing from the application information.					
Return Labels					
Users must have the ability to print address labels, customer labels, etc... as necessary.					
Users must have the ability to print a mailing label report. The report may contain items like instrument number, return status, date returned, return address.					
Label printers must be accessible to all workstations.					
Label printers must be strategically enabled for specific groups of workstations.					

Selection of label ranges to print is designed with maximum flexibility such as cashier order, instrument number order, and individual label by receipt. Individual labels may be produced by using the bar code of the original document.					
Town Council Minutes					
The system has a module or functionality dedicated to creating and maintaining Town Council Minutes with linked images of court material.					
The system has ability to create and track Town Council Minutes.					
The system has the ability to image documents varying in size up to 11"x17", save as a PDF or TIF Format and tag it with certain identifiers.					
The system has the ability to index certain fields for scanned documents.					
Document Retrieval - Interface scanned images with the database (mainframe).					
Ability to create microfilm from scanned images.					
Ability to conduct a word search of the minutes and supporting material.					
Case File Imaging					
The system has the ability to index certain fields for scanned documents.					
The system has the ability to recognize an external barcode to retrieve database information thru an interface.					
Document Retrieval - Interface scanned images with case file database (mainframe).					
Ability to create microfilm from scanned images.					
Historical Records Scanning					
The system has the ability to scan a document or case file, save in PDF or TIF Format, and tag it with certain identifiers.					

The system has the ability to image fragile documents with equipment that will not damage them.					
The system has the ability to index certain fields for scanned documents to create a database.					
The system has the ability to image documents varying in size up to 11"x17".					
Document Retrieval - Interface scanned images with the database (mainframe).					
Ability to create microfilm from scanned images.					
Governmental and Personal Property Imaging					
The system has a module or functionality dedicated to recording and imaging governmental forms (e.g. oaths, depositions, personal financial statements, etc.).					
The system has the ability to index certain fields for scanned documents to create a database.					
The system has the ability to image documents varying in size up to 8.5"x14".					
The system has the ability to produce certified copies along with a certification form that identifies the certified document that includes a seal .					
The system has the ability to track certain personal identification information of requestors for copies of personal financial statements this office must maintain per statutory requirement.					
Data Extraction to Agencies/Customers					
Data Extraction to Agencies/Customers					
The System is able to extract index and/or images by date range, document type(s), document number and volume/page. Describe your method of delivery to meet this requirement.					
The system provides an automated utility to export images and indexes to select business customers. The export should run on a scheduled basis and not require user intervention.					

The vendor supports open records requests. Requests can be fulfilled within a 48 hour period.					
The System has the ability to FTP records to requesting companies containing index and images (e.g., grantor/grantee index of real property records).					
FTP files can be produced from historic records as well as daily updates for newly recorded information.					
The System has the ability to provide external parties the index and image files in a non-proprietary format.					
Code Tables					
Code Tables					
On all screens in the system, any field with a finite, user-defined set of values will be able to receive its value from a preset code table file.					
Code table values for all fields will be presented in a drop down, pick list from which the user will select the value desired.					
Authorized users will be able to add code table entries as needed.					
Access to code tables is restricted to authorized users.					
For historical data purposes, no code table entry can be deleted.					
Code table entries no longer desired will be expired (logically deleted) by the system supervisor.					
Expired code table entries can be reinstated by the system supervisor.					
Expired code table entries will not display on the help field pick list of values.					
All screens will display the code table descriptions wherever possible.					
No two code table entries, from the same table, with the same value, can be in effect at the same time.					
Authorized users always have the option of updating the textual description for any code table entry.					

The users will have the ability to create a full system code table report, which lists all active code table values, grouped and sorted by table type.					
The system supports use of common names table used throughout the system and contains the minimum data elements: Name, Address, email, phone number, contact , etc.					
Electronic Recording (when approved for Rhode Island)					
Electronic Recording					
The e -Recording process conforms to PRIA standards.					
The e-Recording process conforms to State Statutes					
Vendor is to supply a web-based e-Recording software application for distribution to persons authorized by statute to file documents electronically. Please describe your e-Filing solution.					
Vendor must demonstrate integration with national third party submitting companies including eRX, Simplifile, Ingeo, PropertyInfo, etc...					
Web Services					
Web Services					
The system provides multiple methods of payment for certified “copies” of images over the Internet.					
The system is compatible with common computer and mobile device web browsers.					
Web-based public inquiry system must use a common interface with public access system available internally at Clerk's office.					
Web-based public inquiry capabilities must be functionally identical to public access available internally at Clerk's office.					
System has ability to overlay permanent watermark over images and search results retrieved based on user security profiles.					

Security for web services is designed to prevent any unauthorized use. System is able to generate a report of attempts of unauthorized access. Explain your design and approach.					
Viewing of index and images is controlled by the Town based on user security profiles.					
Viewing of specific fields of the index is controlled by the Town based on user security profiles.					
System supports secure network communications (SSL).					
System provides support for Web Services, Mobile Web Services, SOAP, and XML, etc.					
System is able to authenticate users based on username and secure password.					
System should be able to provide different degrees of data access based on user type and ID.					
System should allow for employee access from outside the Town network to access all job functions based on security.					
Public internet website that allows for innovative use of Town data to meet the informational needs of customers including meta-search engines, interactive maps, and online auction through both a conventional online website and also a mobile site.					
Backup/Disaster & Recovery					
System must support a remote configurable synchronization schedule for regular backup of the entire system to an off-site facility including all financials, tables, audit history, index data and images. Vendor must describe the proposed solution.					
The system must automatically recognize and update all new and changed records in the existing backup.					
The system must provide email notification on the success or failure of the synchronization of the data and images.					

Backup must be maintained in a secure location consistent with the Town emergency backup and disaster relief plan. Vendor must provide a description.					
System Documentation					
System Response Times					
Any application program, started on a workstation, will take no more than ten (10) seconds to start and be usable.					
Digital images from the servers' hard disks will be retrieved and displayed in three (3) seconds or less, including during peaks in work flow					
Index search results will be retrieved and displayed in three (3) seconds or less, including during peaks in work flow with any search criteria, including name, file date					
Document Imaging					
Imaging software proposed by the vendor must be a software package that is integrated with customized applications and fully supported by the vendor.					
The imaging software must be PC-based and support stand-alone and network versions.					
The imaging software must support digital scanners from multiple manufacturers, and must be able to utilize all features of a particular digital scanner.					
The imaging software must control use of the scanner through the software screens, and must display to the user all messages communicated by the scanner, including error conditions.					
The image file objects must be compressed and decompressed through software.					
The imaging software must provide desktop utilities that can enhance and process images, including zoom capabilities and clockwise and counter- clockwise rotation.					
The imaging software must support a variety of storage methods.					

The imaging software interface must support the ability to create and/or add objects through a scanner and file importation facility.					
The imaging software must support the ability to print and fax any object on existing Windows print or fax devices.					
The imaging software must support bi-tonal, gray scale, and color scanners.					
Operations System Software Requirements					
Server					
Servers utilize Windows Server 2008 R2 operating system or latest version.					
Web-enabled applications can be accessed using Internet Explorer 7.0 or later version.					
The system must be able to support incremental and full backups. Please describe.					
The product is accessible over a TCP/IP Ethernet network.					
The vendor must provide clearly defined procedures for updating the file servers.					
If necessary, the vendor must provide personnel to perform the file server updates.					
The vendor must provide help desk support for file server updates.					
Workstations					
Vendor must provide Windows 7 or later for workstations.					
All driver software must be constant across all workstations.					
All major applications in the new system must have an icon on the workstation desktop, or system must provide a user dashboard.					
All workstations must have the same software configuration.					
Manuals must be provided for all application software tools included with each PC in hard or soft copy.					
All applications must be Microsoft XP and higher compliant.					

Error Handling					
System captures rejected or unposted transactions in a file for user resolution.					
System provides an error/recycle file for rejected batch transactions.					
System provides the ability to highlight errors on the screen for immediate correction.					
System provides a central log of all problems/errors.					
System provides descriptive error messages.					
Hardware					
Network Components					
All PC workstations, servers, and system peripherals must be fully compliant with the Town's network specifications.					
System has functionality to allow employee access with the appropriate security to remotely access the production environment.					
Server					
Servers must contain appropriate memory and disk space to properly execute system processes; store all converted index and images and provide acceptable response time.					
Server includes unattended automated tape backup system .					
The system must also provide protection against memory and data loss due to power surges and/or outages.					
All new servers and disk storage must include a minimum of a 3-year onsite manufacturer's warranty or better.					
Workstations					
New PCs must have appropriate memory to execute all applications.					
New PCs must have appropriate hard disk space to execute all applications.					
New PCs must have a 101-key enhanced keyboard.					
New PCs must have a Microsoft Windows compatible mouse with wheel or optical mouse alternative.					

The Town prefers of 4 GB or more of RAM on all New PCs.					
New workstation monitors for public research, scanning stations, and administrative should be at least 20 inch flat panel.					
New cashiering station monitors should be at least 20 inch flat panel.					
All new workstations must include a minimum of a 3-year onsite manufacturer's warranty.					
Scanners - High Volume					
Scanning speed for the recommended resolution must be appropriate for 20,000 pages per 8 hour shift.					
Digital Scanners must function with controlling software operational under Windows 7 or better.					
Digital Scanners must have automatic paper size detection.					
Digital Scanners must use compression techniques that create industry standard image files.					
Digital Scanners must support duplex scanning.					
Digital Scanners must support automatic document feeder (ADF) scanning with a capacity of no less than 250 sheets.					
Must support 300-600 DPI images.					
Must support mixed paper sizes (letter and legal sized) in a single batch.					
Must support paper sizes up to 8.5 x 14.					
Laser Printers					
Printers must be capable of printing on letter size and legal size paper.					
Printers must be able to print twenty-four (24) or more pages per minute.					
Printers must be equipped with network interface cards, so they can print directly from the network (as opposed to printing from dedicated workstations).					
Cash Drawers & Receipt Printers					
Cash drawers will be interfaced directly to the cashiers' workstations.					

Check scanner/validation printers will be interfaced directly to the cashiers' workstations.					
Receipts must print in an industry standard laser printer					
The validation printer must be high speed and have impact capability to endorse checks					
Receipt printer and locking cash drawer are integrated with cash drawer workstations.					
Document Validation Label Printers					
Validation printers will be interfaced directly to the cashiers' workstations.					
The label printer will support transparent or clear labels with the following information: "Filed and Recorded," fee, date/time of filing, cashier ID, etc. The "Filed and Recorded" label/stamp will include the Town Clerk's full name.					
System Security					
System Security					
Each user will have a unique logon name and unique password.					
Each user may maintain their logon password.					
System logs transactions by user ID.					
System requires users to change passwords at intervals set by Town Clerk.					
System has the ability to establish a time frame for password to expire and prompt user to enter a new password					
System has the ability to establish a "time-out" limit. If a workstation is left unattended for a certain period, the user's session will be terminated.					
System uses a single password and logon for all system functions enabled in the user's security profile.					
All password and security related files are maintained in an encrypted state.					

When a user logs in to begin a session, all authentication information on that session is made available to any application, screen or transaction that the user attempts to access during that session.					
Passwords must contain alphabetic (case sensitive), numeric, and symbol characters.					
System denies access to user after three (3) failed log-in attempts.					
System records unsuccessful log-in attempts and retains the records for 2 years.					
System issues an alert to the end-user and notifies the system administrator after three (3) unauthorized log-in attempts.					
System deactivates a user ID after a system administrator-defined period of inactivity.					
System enables system administrator to resume and/or revoke passwords.					
System automatically logs off user after a period of session inactivity, as specified by the Town Clerk.					
System allows authorized Town Clerk administrators to establish user security profiles that restrict ability to log-in; or add, delete, change, view, and approve data.					
Each user will have a security profile, which controls access throughout the entire Recording system, including all applications.					
System must provide ability to establish passwords. The password must be encrypted so that it is not viewed when entered.					
The system must allow a Town Clerk administrator and vendor on-site representative to reset ID passwords without knowing the existing password.					
System must be able to provide an audit trail of user access and unauthorized attempts to access.					

System must provide the ability for individuals to only have to log on to the system once to be able to select one or more modules for multi-session.					
The system provides the capability to limit logon of ID to one workstation at a time, based on user security.					
Application access will be configurable in the user security profiles.					
Menu selection access will be configurable in the user security profiles.					
Add, Modify, and Delete capabilities will be configurable for each screen that uses database records.					
The addition, modification, and deletion of application data records will be configurable in the user security profiles.					
The system security must allow for an Inquiry user profile to be created. This user would only have the capability to view records.					
The system supervisor will have the ability to restrict access to certain system printers for each user profile.					
The Security application must provide a set of screens that allow the supervisors to add, modify, and delete user security profiles.					
The user security profile for the system supervisor can never be deleted, and is automatically created when no user security profiles exist.					
A default user security profile template must exist and will be available for use when each new user profile is added to the system.					
The security application must give the supervisor the ability to clone a user security profile when the need to add the same or similar profile arises.					
The security screen, which gives a user the security clearance for each application, must have the names of each application stated clearly.					

<p>The security screen, which gives a user add, modify, or delete capabilities for each application's data records, must have the names of each application stated clearly.</p>					
<p>The security screen, which gives a user access to certain system printers, must state the name of the printer clearly, along with a description detailing the location and function of the printer.</p>					
<p>System provides the ability to have access to office-wide or department-specific data through profile-based security with Town Clerk approval.</p>					
<p>System security has the capability to support integration with the Town's access and identity management tools to allow network sign-on to provide system access with Town Clerk's approval..</p>					
<p>System provides secure access to vendors and employees working outside the Town's firewall.</p>					
<p>System allows authorized administrators to restrict data access for each security profile by using the following values either individually or in combination:</p> <ul style="list-style-type: none"> • IP Address • Employee ID • User ID • Application module • Screens and tables • Workstation • Menu • Report • Data item or field within screen • Employee status • Transaction type • Document type • Role 					

Restrict Access to certain logs/files (i.e., no one should be able to change log files)					
System allows security profiles and related data access limitations to be applied across all reporting and query functions.					
System restricts use of data by external report writers, data extracts, etc. based on user-defined criteria.					
System provides a reporting facility that is easy to use and enables users to access and select data, specify groupings and time periods, and consolidate data in a variety of ways, and download to spreadsheets for statistical reporting and GIS mapping, if needed. Reporting will be available on-demand and via standardized lists and periodic reports.					
System supports standard Internet security, including but not limited to: <ul style="list-style-type: none"> • Public Key Infrastructure (PKI) • Digital Certificates • Various levels of encryption • AES encryption • Secure Socket Layers (SSL) • Secure Hypertext Transfer Protocol (HTTPS) • Digital Signatures 					
System supports both centrally-administered security and de-centralized security administration to accommodate the wishes of the Town Clerk's Office..					
System provides security reports showing: <ul style="list-style-type: none"> • Authorized system use • Unauthorized system use • Security profiles by user • Security breaches or attempts 					
System can selectively (based on user-defined criteria) block/redact the full display of certain data, for example, display only the last four digits of SSNs either online or on a hard copy report.					

System provides security for e-procurement functions, including customer authentication and encryption to protect customer data.					
System security is integrated throughout all application modules.					
The Security application must provide a report, which lists all user security profiles in the system.					
The Security application must provide the ability to deactivate users so they do not have access to the system.					
The Security application must provide a report which lists all printers and which users have access to each printer.					
The system database must be password protected with a password that allows read-only capability, and a password, known only by the vendor and the Town Clerk's System Administrator, that gives read/write access to all database files.					
All users of the new system must have a log on password which establishes a particular user's Security Profile.					
Operating systems used on file servers must contain a full set of system security.					
Any servers used must have all software folders restricted to personnel authorized by the Town Clerk. Users must be given a folder/sub-folder area for storage of user-created files.					
All workstations must be password protected at power up and at the screen saver.					
System maintains historical records (i.e. a log file) of table updates. Data logged includes, but is not limited to, user ID, data before change, changed data and date/time stamp.					
Users must authenticate themselves to access application servers.					
System tools control user access to application servers.					
System tools control access to application servers from other servers.					

System tools audit and report on application server access and access attempts.					
Users must authenticate themselves to access the database or database servers.					
Users must authenticate themselves to access workflows.					
System conforms to the latest version of NIST (National Institute of Standard Technology) standards. Publication 800-53.					
System is able to assign multiple users to a single role					
System is able to define user specific characteristics for a profile without creating a new profile					
System is able to assign multiple security profiles to a single user					
System is able to designate combinations of security profiles as representing incompatible functions and generating a warning message to notify the Town Clerk administrator if multiple security profiles applied to a single user are in conflict. Such instances should be recorded by system.					
System must distinguish security responsibilities with varying levels of authority.					
System must provide multi-level security controls to prevent unauthorized use of system and corruption of data, restrict access to the database, maintain database process controls, and log all database transactions.					
Implementation					
Implementation					
Provide an implementation plan and Gantt chart.					
Provide an organizational chart of the proposed governance model and project staffing structure. The diagram should show proposer, and Clerk team members.					

Describe the nature and extent of project administration services proposed. Services shall include management of proposer's personnel, attendance at project team and Steering Committee meetings, preparation of project status reports and meeting minutes, and serving as the main contact for communication, problem solving, trouble shooting, and issue management.					
Proposer shall work with the Town's Project Director/Manager to plan and execute all implementation phases. Include proposals on the following: a. Implementation/deployment plan that includes implementation strategy and timing b. Business process re-engineering plan c. Change management plan d. Communications plan e. Issue reporting, tracking, escalation, and resolution procedure					
Schedule and coordinate installation of the mandatory application software.					
Schedule and coordinate data conversion for integrated application software modules and mapping of existing data to new system.					
Schedule and coordinate classes needed for staff (super-user, user, and technical) training.					
Coordinate site preparation with Town Clerk Staff.					
Schedule and coordinate installation of proposed hardware (CPU, disk storage, to add on to existing backup).					
Schedule and coordinate installation of operating system software.					
Schedule and coordinate installation of peripherals (workstations, printers, optical storage, and scanners).					
Schedule and coordinate installation of interfaces to both outside agencies and other Town applications.					

Schedule and coordinate installation of the relational database.					
This project will receive the full attention and support of the vendor. As a result, the vendor will place key people on-site during the development, installation and training effort. Key proposed team members are to be listed with qualification in the RFP response.					
The product must include personalized, comprehensive training material (manual or automated) to provide for initial and ongoing training requirements.					
Provide training to external users of the system, such as Title Companies, Attorneys etc...					
The vendor has the financial and human resources to support a project of this size within the specified time frame.					
The vendor approach and recommended installation timeframe must meet the required Town Clerk deadlines.					
Based on Town volume, vendor will make staffing recommendations in order to maintain acceptable service levels.					
Maintenance & Support					
Maintenance & Support					
The product is supported by the vendor through a 24-hour a day 7 days per week product support line.					
The vendor has a record of responsiveness to the needs of its installed customer base. Specifically, the vendor will respond to all problem requests received from the Town Clerk's Office. An initial response will be received within 1 hour, critical problems will be addressed and resolved within 24 hours, with all other production problems addressed and resolved within 48 hours. If the need arises, the vendor will have additional individuals on-site.					

All support and maintenance including, but not limited to, all software upgrades, configuration changes, report additions, software support and statutory changes to be included in service agreement.					
The system gives appropriate procedures for correcting the errors through online prompts.					
There is a provision for non-technical, complete, and easy-to-read user documentation, including reports, online functions, screen illustrations, data entry requirements and diagrams of table links.					
The vendor provides toll-free telephone support for public users.					
The vendor provides an online help management system and reporting tool for reporting, tracking and logging of issues. Please provide a description of the tool you use.					
Vendor will provide contact information of escalation contacts who may be reached 24/7.					
Data Conversion & Upgrades					
Data Conversion & Upgrades					
Vendor is required to convert 100% of the electronic data and images from the existing system. This will include where applicable: Land Evidence, Probate, Vital Records, Dog Licenses, Marriage Licenses, Trade Names.					
The system provides for version change control to maintain update modification information for support purposes.					

<p>Upon conversion of real property records, the vendor will produce exception reports listing the following:</p> <ul style="list-style-type: none"> • Missing instrument numbers • Instruments with no grantors • Instruments with no grantees • Instruments with no legal description • Invalid dates • Instruments with no images • File date and volume number mismatch • Others as determined 					
<p>Upon conversion of Marriage records, the vendor will produce exception reports listing the following:</p> <ul style="list-style-type: none"> • Missing instrument numbers • Marriage records with no bride/groom names • Invalid dates • Missing marriage application dates • Missing marriage license dates, as applicable • Missing record type Missing volume or page others as determined 					
<p>Upon conversion of Death records, the vendor will produce exception reports listing the following:</p> <ul style="list-style-type: none"> • Missing registrar file numbers • Death records with no deceased name • Invalid dates • Missing sex, race, and/or age • Missing place of death • Missing residence location • Missing cause of death • Missing volume or page • Others as determined 					

<p>Upon conversion of trade names records, the vendor will produce exception reports listing the following:</p> <ul style="list-style-type: none"> • Missing registrar file numbers • Invalid dates • Missing record type • Missing business name • Missing owner's names • Others as determined 					
System Management					
System Management					
System provides the ability to restart interrupted processes.					
System provides the ability to transfer archived information to be stored off-line (e.g. tape, cartridge or microfilm).					
System provides the ability for modifiable archive criteria options that can be easily changed by an authorized user. File synchronization and referential integrity of tables must be maintained.					
System provides document repository(s) that will enable any authorized user to search for and retrieve documents for a user-defined number of years online and indefinitely from archives.					
System allows authorized user to specify the length of time historical records are maintained online by specific type of data. This time frame must be able to be modified periodically as appropriate and approved by the Town Clerk.					
System identifies the final destination of each physical document and the document's final destination date.					
Technical Requirements					
System Architecture					
Real-time update of tables from end-user input screens.					
All input (i.e., batch, interfaced and on-line) edited via Town Clerk - defined parameters prior to processing.					

Open standards computing platform (e.g., Java, .NET, etc...).					
The system database must be ODBC compliant (Open Database Connectivity).					
The system must support single-sign on and must be compatible with Microsoft Active Directory.					
System must have export facility that supports at least one of the data-transfer formats listed below. This facility should include the ability to select from data views information which is needed to update legacy systems or external agencies. <ul style="list-style-type: none"> • XML • EDI • Flat file (e.g. ASCII, comma-delimited, etc.) • DIF • CVS • RTF • or Support automated table export tools 					
Communication services -- guarantees message delivery and handles queuing and encryption for various types of communication (e.g., publish and subscribe, request/reply, etc.) including the use of third party ESB (Enterprise Service Bus).					
Data-flow services -- routes data to the appropriate destination(s) and filters messages.					
Data-mapping services -- links data to the appropriate meaning in different schemas.					
Data-transformation services -- handles data validation, calculations, lookups, padding, truncation, etc...					
Transaction processing services -- manages transactions across multiple applications.					
Business process flow services -- groups and links data flows to automate the steps in a business transaction.					
Web Services functionality (i.e., UDDI, WSDL, SOAP, etc...).					

System provides toolsets to accommodate the following:					
Database maintenance					
Report design and generation					
Application security administration					
End-user interface design					
System upgrade administration					
Archiving/purging of data					
System must provide a maximum online response time of less than five (5) seconds on average in the production environment.					
System supports a fully scalable architecture designed to allow incremental increases in hardware capacity to meet demands of increased usage.					
System supports multi-node application server processing so that application processing load can be distributed and balanced across multiple physical servers. Please provide diagrams that illustrate how your technical architecture meets this criteria.					
System architecture supports rapid failover or redeployment in the event of planned or unplanned interruptions. Please provide diagrams that illustrate how your technical architecture meets this criteria.					
System must provide clustered or parallel processing server components (database and application) that allow hot addition/deletion of hardware components to address peaks in demand. Setting up the servers in this fashion will assist with no single point.					
System architecture ensures that batch processing does not interfere with on-line responsiveness or availability.					
System architecture provides user session isolation such that a failure in one session has no impact on other user sessions.					

System should support Microsoft Internet Explorer 6 or higher and should be fully compliant with the agreed upon version of HTML (e.g. HTML 4.0 Transitional).					
All system data can be archived and retrieved.					
Town Clerk shall define retention periods.					
Deleted records are marked for deletion but not removed from the database until archived.					
Town Clerk has the ability to reset deleted records (maintaining referential integrity).					
System provides a method to access, query, and report against archived data.					
System provides method to access archived data when system architecture changes as a result of software upgrade.					
System is vendor-independent, that is, system is non-proprietary, based on non-proprietary technology and is not locked into usage with proprietary hardware or operating system platforms.					
The System minimizes the use of any technology that includes branded products, or dependencies on branded products.					
Access requirements through firewalls should be clearly identified and follow standard port designations (port 80 and 443), where possible.					
Processing for erroneous transactions is suspended until the error is resolved.					
System provides job scheduling tools to automate administrative tasks such as data base backups or regular report production.					
Menu structure is maintained during software upgrades.					
System provides software distribution tools to facilitate migration of application software to other servers (e.g., test, development, etc.)					

Application is supported by version control tools that provide "check in" and "check out" support.					
System tools support enterprise-wide administration of multiple application servers.					
System tools support proactive management of application server resources.					
Database Management System					
The system supports MySQL database.					
User identity must be propagated to database records and logs.					
The system updates all related modules and tables with a single entry, for example, an account number change is made only once but takes effect throughout the system.					
The system tracks and stores date effective changes throughout all modules.					
The system provides query features that support alternate field lookup, for instance, using property address to look up property legal description.					
The system provides table look-up fields that can be linked to, or refer to, other tables.					
The system database supports execution of procedures stored in the database based on event triggers.					
The system database provides automatic replication of table updates to multiple databases.					
The system database locks records at the data item level.					
Data attributes can be configured by the Town Clerk personnel.					
The system database provides structured query language (SQL) capabilities for database queries.					
New data items are automatically included in migration paths during software upgrades.					
Data model documentation for accommodating new fields is included as part of upgrade strategy.					

The system will perform updating from external batch sources (e.g., other application systems) through a standard interface. See interface requirements for details.					
The system supports mass changes to defined groups of transactions or table-driven data, if properly authorized by the Town Clerk.					
The system provides the ability to monitor access logs.					
The system provides the ability to monitor database performance.					
The system provides the ability to perform database updates using logical transactions to ensure referential integrity.					
The system provides the ability to support transaction commit/rollback as required by the application.					
Processing					
The system supplies job scheduling tools that allow users to predefine start times for batch processes.					
The system supplies job scheduling tools that allow users to control jobs by transaction type.					
The system allows users to sequence multiple jobs based on user-defined rules.					
The system provides automatic program checks for controlling data files, verifying correct processing, and ensuring data integrity. Available program checks include record counts, totals, limit checks, and dollar totals.					
The system automatically reconciles all exported/imported data (e.g., reconcile that what was sent and was received.)					
Application system is based on Service Oriented Architecture (SOA).					
The system supports multiple concurrent application sessions for each user on a single computer.					

The system supports returning only a generic server error to the end user while logging a detailed error in a location only accessible to Town Clerk administrator, on-site vendor representative, and other vendor support personnel.					
Desktop Integration/Configuration					
The system supports the importing/exporting of data with popular desktop applications. (e.g., Microsoft Excel, Microsoft Word).					
The system utilizes standard e-mail protocols to include IMAP, MAPI, POP3, SMTP, etc...					
Web Browser Portability					
Storing of configuration information may not occur at the web layer, other than what is strictly required to bootstrap the initialization of the system.					
Specialized Workstations and Servers					
Any proposed solution requiring specialized client workstations and/or servers must meet the following requirements:					
All appropriate licensing, to include but not limited to, operating system license (Windows 7 or better), Microsoft Office 2010 or better license, Microsoft Client Access license, Microsoft Exchange Client license					
Workstations must support 10/100 Mbps Ethernet. Servers must support 10/100/1000 Mbps Ethernet.					
Infrastructure Requirements					
Technology is based on "Virtual Server Architecture".					
System must be fully supportable within the infrastructure platform that is recommended.					
Capacity estimates for processor performance requirements must be provided for all proposed solutions.					
Capacity estimates for processor memory requirements must be provided for all proposed solutions.					
Capacity estimates for storage requirements must be provided for all proposed solutions.					

A reporting database must be run in parallel to the on-line transaction processing (OLTP) database, from which the reporting database will be refreshed at scheduled intervals by an extract, transform and load (ETL) batch process					
Queries and reports that would otherwise overtax the OLTP database must be routed to the reporting database.					
Queries must be constrained to balance load across sessions – in particular:					
Lookup queries where wildcards are allowed must be directed to the reporting database.					
Analysis and reporting queries must only be executed against the reporting database and not the OLTP database.					
System should utilize the Town's standard method for remote support which is WebEx. Currently, the Town Information Services does not allow VPN or other direct, outside access by third parties.					
The system must not store any data on the user's workstation, and must not store cookies between user sessions.					
Web servers must utilize Windows IIS6 or better.					
The resource tier must be designed to remain as agnostic of back end specifics as possible, in particular where the data store is a relational database the data access code must not introduce any dependency on vendor-specific features.					
The system must be portable across database servers and data access components and must therefore adhere to the ANSI standard for SQL, free of vendor-specific extensions and/or vendor-specific stored procedures.					
Services Agreement					
Include a form covering support and software licensing agreement.					
Source code must be held in escrow with the Town listed as a beneficiary on the Vendor's account. Source code must be updated as the application is upgraded.					

Additional Services					
Provider must include service for archival of all images to 16mm microfilm and deliver to town archival facility					
Provider must include service to provide land index print-outs and binders in format and fequency as determined by town.					