State of Hawai‘i

560 North Nimitz Highway
Honolulu, Hawai‘i 96817

April 18, 2019

Request for Quotes (“RFQ”) No. HRP 2019-33
Software Program for Hawaiian Registry Program

To All Interested Parties:

Notice is hereby given that the Office of Hawaiian Affairs (hereinafter “OHA”) will be accepting quotes from interested Offerors that can provide a software program that can convert from our Hawaiian Registry Program (hereinafter “HRP”) paper records into a searchable digital library.

The term of this Contract shall be for one (1) year with the option to extend for up to three (3) years subject to the availability of funds.

Quotes must be received through the HIePRO website by 2:00 p.m. Hawai‘i Standard Time (“HST”), Friday, May 3, 2019.

The selection shall be contingent on the lowest most responsible and responsive quote for the OHA. The OHA reserves the right to reject any or all quotes and to accept the quotes in whole or part in the best interest of the OHA.

BACKGROUND

The HRP collects and maintains HRP Forms and a variety of documents containing Personally Identifiable Information (hereinafter “PII”). These documents are paper copies and the records are filed alphabetically by last name. Locating paper records is time-consuming, and quick access to records is becoming increasingly necessary.

Currently, there are approximately 38,000 HRP records. Each record may contain a different number of documents, but a typical record contains three (3) documents. This means there is well over 100,000 individual documents to scan. HRP grows at about 2000 records per year.

SPECIFICATIONS AND REQUIREMENTS

The successful Offeror shall satisfactorily provide the goods and services hereinafter set forth that shall include, but may not be limited to, the following:

1. Accessibility

    a. Digitize HRP records so that they can be easily accessed by HRP staff from their desktop computer.
    b. Recommend, provide and implement an appropriate Document Management System (hereinafter "DMS") or Enterprise Content Management (hereinafter "ECM") software, or other software as deemed appropriate to meet HRP needs.

2. Digital Preservation

    Provide a way to preserve the original scanned record by either creating separate "preservation" and "access" copies of records or through version tracking or by some other means. As edits and annotations are made to scanned records, we need a way to preserve the original, unedited scanned record to be in alignment with State Records Management recommended practices, which also includes using a recommended file type (such as PDF/A), 400dpi quality, having audit logs, user access levels and indexing described in more detail below. See Department of Accounting and General Services at https://ags.hawaii.gov/archives/about-us/records-management/records-management-policies/.

3. Records Management

    a. HRP records must align with state Records Management recommendations since the OHA is a State agency.
    b. Provide and implement an appropriate software solution to set us up to transition from paper to digital.

4. File Storage

    a. Scanned HRP records are to be stored in-house on the OHA servers.
    b. Scanning of records is to be done in-house by the OHA staff using the OHA Xerox machines (Xerox WorkCentre 7855).
    c. Scanned records are to be saved as PDF/A files at 400dpi, unless otherwise recommended by the vendor.

5. Training and Support

    a. Provide training for two (2) OHA personnel. Training should cover general use of the software and features described within this document, which includes but is not limited to: scanning a paper record into a digital image using OHA Xerox machines, indexing, creating custom index fields, how to search for scanned records, how to view scanned

records, how to manage user access levels, etc.

    b. Provide ongoing support in the event errors are encountered or changes need to be made in the future.

6. Requirements

The following software features shall include, but may not be limited to, the following:

    a. Compatible with Windows 10.
    b. Compatible with our Xerox machines (Xerox WorkCentre 7855).
    c. OCR capability with OCR search.
    d. 10 initial users, who will all be OHA staff, with ability to add more users in the future.
    e. Ability to set and manage user access levels for each user. Some staff should only be able to view records, while other staff (specialist/management/administrator) should have full access to view, edit, delete.
    f. Must be able to index HRP records via database lookup. Some information about the records is captured in the HRP database, which is an MS Access database containing basic information about the record such as ID Number, first name, last name, DOB, etc.
    g. Must be able to create custom index fields and add custom index fields in the future.
    h. Capture additional metadata: date created, created by, registration date, date modified, modified by.
    i. Image cleanup features. HRP records were copied onto paper inconsistently. Some have separate documents copied onto the front and back of the same piece of paper. Many documents were copied askew. Some records contain two separate documents that were copied onto one sheet of paper. Cleanup tools such as crop and rotate will be needed.
    j. Redaction and annotation capability.
    k. Ability to add new documents to an existing scanned record.
    l. Includes search capability and viewer so that HRP staff can search for and view records once they are scanned.
    m. Ability to set search fields in order to search records by ID Number, by Name (First/Last), or other criteria or index field.
    n. The viewer should allow a user to view every document contained within a record. The ability to view multiple records at once would be preferable.
    o. Version Tracking - in order to retain original scanned record and see edits/annotations made over time.
    p. Audit logs of access history – show who accessed/edited a record and the date.
    q. Ability to set and manage retention schedules. Records that have reached the end of their retention schedule should be marked for authorized staff to delete. Also, when a record is destroyed, its metadata should be retained to keep a history of it.
    r. Ability to digitally shred records.

The successful Offeror must be registered as a business in the State of Hawaiʻi and be compliant with Hawaii Compliance Express, submit a current copy of your Certificate of Liability Insurance, and complete the OHA W-9 form.

If you have any questions, please contact Charmaine Matsuura, Procurement Specialist at (808) 594-0273 or by email: charmainem@oha.org.