

ADDENDUM No.1

No. 25-07

Scanning of County Records for Lewis County NY

Date: March 24, 2025

To Whom It May Concern:

Here are responses to questions that have been asked in response to this.

1. Is the County required to award the bid to a New York State Disadvantaged Vendor?
Per the Grant requirements the vendor must be a NYSID approved vendor.
2. Could you provide an estimate for the number of multi-page documents (PDF?) that will need to be indexed from the 325,000 images?
There is roughly 2500 pages per box. Each box can vary on number of multiple page documents, but it may be a safe presumption that out of the 325,000 images then 162,000 images could be part of a multiple page pdf.

Page 9: Project Requirements:

Records Imaging Services:

3. Can the spines of the bound books be cut? If not, what alternatives should be considered?
To be considered on a case-by-case basis, we anticipate 90% + of files submitted will be loose leaf, stapled, or pinned. Alternative proposals from companies submitting bids would be welcome.
4. What percentage of the records are considered fragile? What qualifies a record as "fragile"?
Defining fragile as some degree of deterioration or damage, such as minor rips, folding, or fading, which may require special care to ensure all information is captured.
5. What is the correct quantity to be quoted? On page 9, the total listed is 375,000 images whereas on page 11, under **Records Retention**, the total listed is 325,000 images. *The quote should be for up to 375,000 pages.*
6. Are the records already boxed? If not, where are the records housed? (i.e., file cabinets, shelves, etc.) and would the vendor supply the boxes?
Empty banker boxes should be supplied by the vendor, as not all records are currently boxed. Approximately 90-95% are already boxed.

Page 10:

Conformance with NYS Archives Guidelines:

7. Would scanning the records to PDF, 300 dpi, Color, B/W, Grayscale, and OCR meet the requirements? If not, what else would be required?

We are required to select a NYSID or NYSPSP compliant vendor/ Preferred source contractor. All scanning must also comply with the NYS Digital Imaging guidelines available for your reference here:

https://www.archives.nysed.gov/sites/archives/files/mr_erecords_imgguides.pdf
and here: <https://www.archives.nysed.gov/records/topic-imaging>.

Indexing:

8. How many fields of indexing are required, and what specific metadata should be captured? For example, would the fields be: Department, File Type, and Folder Title, or are there other required fields?

Each department will select their own specific indexing method in conversation with the clerks department: however, the approximation of up to 4-6 metadata fields is appropriate (DATE, for example, may be added).

Timeline:

9. Is there any flexibility to allow for fewer trips if more records can be picked up on each trip?

Yes, a detailed timeline would be developed in coordination with the clerks department prior to project implementation.

Page 11:**Return of Records:**

10. Should the records be boxed for archives or is any reassembly required (i.e., returned to folders, etc.)

The documents will not need to be reassembled in full (ie return to folders, stapling, paperclips) but should be kept grouped by box for archiving. This will be a case by case basis but most of the records can immediately be placed to be purged or shredded. Historical documents will need to be returned.

11. Are we expected to scan documents at 300dpi as B&W? scanning will be conducted by an external agency (see BID 25-07 Scanning of County Records) and must comply with LGS-1 records digitization minimum quality standards, and must be completed by a NYSID or NYSPSP vendor.
12. What will be the size of the small documents i.e. 8.5" x 11" or 8.5" x 14" or 11" x 17"? 8.5x11. Select files may be smaller, select files may be larger and up to 11x17.
13. How many Pages should we assume in one bankers size box? 2500/box
14. How many files will be stored in one banker's box? Varies by department, up to 500 files in an average box.
15. How many pages in one file on average? between 5 and 20 pages per file (double sided), with some larger files.
16. What is indexing/ file naming criteria? i.e. first name, last name, department etc. varies by department; naming plan will be identified in partnership with each department and user as part of service requested.
17. How many keystrokes per each Index should we assume? unknown, finalized filing system plan to be coordinated as part of service with each department.
18. How many Indexes in one box should we assume? unknown, finalized filing system plan to be coordinated as part of service with each department.

19. How many concurrent users you will need to access the document management system? **All of our users should be able to have simultaneous/concurrent access to the database.**
20. Have you considered or reviewed any Document management/ record management system before? **yes**
21. Our software employs a named user licensing model tied to two main types of users: Full Users and Participant Users. Full User can be granted ability to do anything within the repository including administering the system, importing document, and editing metadata. Participant Users are read-only users who can also participate (submit/approve) in forms processes. Do you know the number of users between these two licenses? Or would you like us to submit general pricing tiers only? **15 full rights, up to 22 participant users, with the opportunity to expand**
22. For accessing Document Management System, how many users will need full rights (upload, edit cases) and how many will need read-only rights (only view the cases or participate in workflow process)? **15 full rights, up to 22 participant users, with the opportunity to expand**
23. Is the County's preference more towards Cloud or On-Premises Document Management System? **cloud**
24. Do you have budget already available for this project? If yes, what is the maximum budget you are planning to spend on this project? **for the pilot program our maximum budget is \$150,000, which also includes all equipment costs and scanning to be completed by an outside NYSID/NYSPSP vendor.**
25. Has the County seen demonstrations of any Document Management System? If yes, what is the name of the solution and vendor which provided the demonstration? **Yes, Laserfiche and Docuware**
26. Is there any expected timeframe within which you would like this system to go-live? **Beginning stages fall 2025**
27. Can we request to extend the due date for two or three days? **No, the due date was developed based on an upcoming grant application.**
28. Is there a price sheet the County would like the proposers to submit the pricing for the proposal or is the proposer to create one? **Please create a price sheet as you see fit to support the bid you submit to provide digital document management services for Lewis County.**

Please reach out if you have any questions.



Brian Hanno
Lewis County Purchasing Director

**Receipt of Addendum Acknowledgement
No. 25-07
Scanning of County Records for Lewis County NY**

**ADDENDUM ACKNOWLEDGEMENT
ADDENDUM NO. _____**

**Please acknowledge the receipt of the above ADDENDUM issued by the County
of Lewis, by signature and recording the date of receipt below.**

Bidder:

Authorized Signatory: _____ -- Date:

****NOTE: This form must be included in your bid documents if
any Addendum is issued**