

ATTACHMENT A
SOLICITATION NO. 2200000013

This Solicitation is a Contract Document and is a request for proposal in connection with the Contract awarded by the Office of Management and Enterprise Services as more particularly described below. Any defined term used herein but not defined herein shall have the meaning ascribed in the General Terms or other Contract Document.

PURPOSE

The Contract is awarded on behalf of the District Attorneys Council (DAC) for the procurement and implementation of a proven Commercial off the Shelf (COTS) Web-based solution for case management. Please refer to Exhibit A titled *DAC Background and Project*.

1. Contract Term and Renewal Options

The initial Contract term, which begins on the effective date of the Contract, is one (1) year and there are ten (10) one (1) year options to renew the Contract.

2. Responsibilities and Obligations of Supplier

Supplier shall:

- A. implement and support a Prosecutor Case Management System (PCMS) Solicitation as specified in the Request for Proposal.
- B. maintain and update electronic documentation throughout the life of the project to reflect hardware/software version updates and modifications with a comprehensive set of user, system, and management documentation. DAC requires both electronic (online or otherwise) documentation and hard copy documentation volumes. The electronic user documentation shall describe the components, functions, and operations of the solution.
- C. install and completely and successfully test both the database and application software on the DAC-provided hardware and network infrastructure.
 - 1. The acceptance tests shall include functional and performance testing using an agreed-upon test plan.
 - 2. Customized reports and workflow changes will be part of the functional test plan.
 - 3. After acceptance of the test results by DAC technical personnel, a live production test will be scheduled and conducted to achieve final acceptance.

4. A draft acceptance test plan (ATP) shall be submitted as one of the deliverables.

3. Obligations of Agency

Agency shall:

- A. commit DAC technical and investigative personnel to the project to facilitate timely completion of all objectives in this project.

4. System Requirements

1. The system must be web based and provide the ability for stakeholders such as district attorneys, staff, and law enforcement partners to interact with the district via the web and web services; and allows employees to access reports and/or different services via the use of a browser.
2. The system must provide a secure real-time processing and access to data based on defined business rules in receiving and sending data from internal and external entities. Information and transaction outputs will be available as soon as the transaction has been completed.
3. The system must provide a customer-centric model that effectively supports the DA offices' case management, including recording and tracking criminal cases which can have one or more defendants with one or more criminal charges for felony, misdemeanor, juvenile, infraction, or special cases.
4. The system must provide a user-centered design that will optimize the product around how users can, want, or need to use the system, rather than forcing the users to change their behavior to accommodate the system.
5. The system must provide data storage with the ability to access statistical data and information, through ad hoc and standard reporting. A report generation framework utilizing DAC's business rules, and the ability to generate statistical data and information through customizable and standard reports.
6. The system must support Microsoft Active Directory, which is the primary method to be used for single sign on.
7. The system must utilize industry-standard relational database and implement minimal de-normalization for performance considerations. The system must have the ability to perform adequately under high volume.
8. The database design scheme must support a person-centric model that preserves data integrity with a standardized entity relationship that meets national standards like NIEM and CJIS specifications.

9. The database design must support inherent security features that feature principles of role-based security within each module and a highly configurable privilege management scheme.
10. The supplier must provide backend database access to DAC IT. The access must allow DAC IT to run queries against the live database in real-time.
11. The system must allow for the implementation of different business rules based on case type and other case and name attributes.
12. The system should include a document automation tool for the creation of various court documents, letters, and forms that retrieves data from the database and is fully integrated with MS Word. The supplier must fully describe functionality and limitations of the document automation tool.
13. The supplier must provide Application Programming Interface (API) to allow DAC IT to create new interfaces. Training must be provided to DAC IT.
14. The supplier must provide DAC IT the ability to create reports and charts and the ability to conduct data analysis and export data as needed.
15. The supplier must provide DAC IT the ability to create document templates as needed.
16. The system should allow privileged users the ability to define, add, modify, or remove business rules without having to request application modifications from vendor support.
17. The system must be capable of utilizing validation routines to warn or prompt users on the screen based on user defined business rules to minimize data entry errors.
18. The system must be able to leverage district specific business rules to enforce/require data entry into select fields. The system must also support built-in dependency based on value select in correlating fields. For example, a district may choose to prohibit closing a case without a disposition. The supplier should describe any and all limitations of business rule functionality.
19. The system should have the ability to communicate with business partners by providing a consistent method for interfacing and a consistent message format for exchanging data.
20. The supplier is expected to have the ability to transition interfaces for each exchange to be accessed and migrated to use web services standards and adapters that identify where exchanges are sent to or received from legacy systems.

- 21.** The system shall eliminate redundant data entry, ensuring that once data has been entered, it doesn't require re-entry in another area of the application.
- 22.** The system must allow for modifications or additions to drop down menus.
- 23.** The system should store and link information with the appropriate case, using electronic case folders that contain automatically generated documents or any valid system file.
- 24.** The system should be able to track correspondence by individual and by individual involvement to a particular case.
- 25.** The system should provide a method for automatically linking/triggering events, case status changes, documents, and correspondence (i.e., a certain event will trigger creation of a particular document).
- 26.** The system should allow for renaming system fields to meet local agency or user requirements.
- 27.** The system must include the ability to electronically route cases and work tasks and notify system users of those routed items.
- 28.** The system should provide an interface to send SMS messages to a contact's phone number. The system should track and maintain the sent and received messages.
- 29.** The system shall be structured and well-documented and easily support changing business rules.
- 30.** The system should provide template-based email notification customization.
- 31.** The system should support modular design with programs organized to maximize the re-use of common logic.
- 32.** The system must provide up time monitoring, user access logs, audit logs, database logs, and application logs.
- 33.** The system should provide a robust business-rules engine.
- 34.** The system should provide a robust workflow engine.
- 35.** The proposed solution must include a centralized capability to deploy and manage application changes to all modules.
- 36.** The system must provide for the mandatory use of agency-specified codes in user defined fields.

37. The system must have a robust printing capability.
38. The system must have document scanning and importing functionality with integrated OCR capabilities for indexing and searching documents.
39. The system must have event management and calendaring features which integrate with Outlook.
40. The system must have a configurable dashboard a user can customize to display case load, tasks list, assignments, notes, events, recent activities, etc.

5. General Requirements

1. The system must enable users to record and track criminal cases which can have one or more defendants with one or more criminal charges for felony, misdemeanor, juvenile, infraction, or special cases.
2. The system must enable users to record and track civil cases which can have one or more defendants with one or more municipal charges for felony, misdemeanor, juvenile, infraction or special cases such as forfeiture cases.
3. The system must support multiple case types such as criminal felonies and misdemeanors, citations, grand jury, juvenile, civil, child dependency and negligence, special prosecutions and appeals.
4. The system must have case assignment, productivity tracking and notification features.
5. The system should not require administrator level access for updates on system user workstations.
6. The system must allow entry and tracking of case intakes from law enforcement agencies, including charges, victims, witnesses, officers, narratives, and supporting documents.
7. The system must allow entry and tracking of trial information such as digital evidence, subpoenas, fines and sentencing information/ conditions, and legal documents.
8. The system must allow entry and tracking of post-trial information such as court events, in custody status, defendant supervision, and drug court tracking.
9. The system must allow entry and tracking of dispositions, sentence hearings, post-adjudication information and modifications, event tracking.
10. The system must allow entry and tracking of discoveries, evidence, investigations, motions, victim services, restitution and compensations, witnesses and witness reimbursements, diversion/deferred prosecutions.

11. The system shall allow entry and tracking of protective orders, warrant reviews, extradition and conflict avoidance.
12. The system must manage the storage and retrieval of reports, photos, videos, audio files and other digital files.
13. The system must have an in-court view to aid prosecutors to review court dockets and review case specifics in the courtroom.
14. The system must support legal document generation into MS Word, PDF, and other relevant document types.
15. The system must allow entry and tracking of state statutes and charging language.
16. Supplier must convert 100% of data from legacy system (JustWare).
17. Supplier must convert all reports and automated documents. All conversion costs must be included in quote.
18. Supplier must provide, included in the quote, an interface from the PCMS to the Oklahoma State Bureau of Investigation (OSBI) to report case disposition information.
19. Supplier must provide options for interfaces to other judicial partners and law enforcement agencies as outlined in the interfaces section of RFP. If these interfaces require an additional fee, that fee must be noted in the proposal.
20. Supplier must include system configuration, data conversion, report conversion, automated document conversion, interfaces, and training, and be completed per District within two years of a fully implemented contract.
21. Supplier shall specify all hardware requirements for an on-premises implementation option, as well as a hosted cloud-based implementation option if submitting bids for both.

6. Search Requirements

1. The system must have an efficient search engine that leverages algorithms which rank, sort, and list search results to quickly locate case and name records. Each search result should provide link(s) for name and case access. Please specify the search engine used.
2. The search engine shall provide capabilities such as fault tolerance, indexing, analytics, tokenization.
3. The search engine shall provide features such as ranking, sorting, highlighting, and result grouping.

4. The system must provide partial-text search capability to allow searching of parts of names, addresses, and other data elements.
5. The system must provide full-text search capability to allow searching of information contained in documents and large character objects within the database.
6. The system should provide synonym search capability to allow searching of alias names and rank results efficiently. E.g., searching “Debbie” should also search synonyms table and return results for “Debra”.
7. The system should provide soundex search capability to allow searching of names based on sound instead of spelling and rank results efficiently. E.g., Smith vs Smyth.
8. The system should provide fuzzy search capability to allow searching of information with typos and rank results efficiently. E.g., Gppgle vs Google.
9. The system should allow exporting of search results.
10. The system must provide an advance search capability to search on ranges of information in applicable fields, such as name, date, code type/description, etc.
11. The system must provide for administration and managerial searches to be conducted on screen, and provide number counts of search results (e.g., number of cases of certain type with certain status will visually display how many records meet the criteria).
12. The system must be capable of restricting searches performed by system users or groups based on security access control levels defined by an Administrator.
13. The system shall allow excluding redacted data from search from appearing in search results. Security access control levels should define who could see redacted information in search results.

7. Discovery and Documents Requirements

1. The system must provide a fully integrated electronic document management system to help DAs achieve a paperless workplace by eliminating the need for keeping physical files. Please describe how your product furthers that goal.
2. The system must provide a fully integrated eDiscovery portal. The system must allow users to assemble selected documents, photos, videos into a package and electronically share/deliver them to a defense attorney via the portal.
3. The system must track views and downloads of documents accessed by the defense team via the eDiscovery portal.

4. The system must provide date stamping technology to allow user to mark documents with seals, company name, address, logo and/or legal terminology.
5. The system must allow users to redact sensitive information from documents.
6. The system must have versioning technology. For instance, when a user redacts sensitive information from a document, the system must automatically maintain original/unredacted version and create a copy for changed/redacted version. Users must be able to select from the available versions of the documents to fulfill an eDiscovery request.
7. The system must support Word Merge Templates or other generic means of adding data to documents.
8. The system must have the ability to automatically generate documents based on Word Merge Templates to enable DAC IT to insert data contained in a database into an auto-generated document automatically, e.g., insert court case number, defendant name and address into an auto-generated document. Please describe Word Merge Template capability of the system.
9. The system must have the ability to automatically generate documents based on Logic Driven Templates or other advanced means of adding data to documents.
10. The provider must have a program/interface to allow DAC IT to create Logic-Driven Templates. The logic-driven template integrates custom question/answer forms to assist users in selecting the correct information to insert into a document. For instance, if a defendant has multiple addresses, the programmed logic will prompt the user with a form to select one of the addresses, or the logic may automatically select an address by evaluating the available data. Since this eliminates the manual changes and cleanup a user has to make to an auto-generated document, it is a valuable time-saving feature that benefits end-users.
11. The system must allow generated documents to be associated to a case or file name for future reference.
12. The system must allow generated documents to be flagged for discovery.
13. The system should provide additional layer of security for documents. The end-user should be able to manage who can see the documents.
14. The system must allow searching of all files, documents, and other files that are stored in the electronic case. Please describe search functionality.
15. The system must allow for batch document production.

16. The system must provide the ability for DAC IT to create additional templates for system users.
17. The system must be able to utilize business rules and workflows to automatically generate documents.
18. The system must have the capability to automatically generate, and email documents based on user-defined business rules.
19. The system must provide a fully integrated electronic document scanning mechanism.
20. The system must OCR and index scanned documents to make the content searchable. Please describe OCR features and limitations.
21. The system must allow for import of scanned PDF documents with optical character recognition (OCR) or contain its own scanning and/or OCR module.
22. Preference for ability of OCR functionality to be queued and accomplished offline to reduce the scanning operator wait time.

8. Financials Requirements

1. The system must include a fully integrated accounting program that is included in the quoted price.
2. The system must have a financial module that handles payment posting and tracking, depositing, creating and tracking payment schedules, issuing vouchers, reconciling, and reporting.
3. The system must have the capability of providing integrated tracking for multiple Prosecutor financial programs including DA Probation Supervision, DA 991 fee collection, Bogus Check, Victim Restitution, Drug Fund/Forfeitures, and Witness Reimbursement. The goal is to have one integrated system.
4. The system must allow each financial program to be tracked separately. However, if a person is involved in multiple financial programs, the information needs to be visible to financial users that manage the programs.
5. The system must associate payment with the proper case, defendant, and financial program when funds are collected, including splitting a payment across multiple cases or financial programs
6. The system must be able to handle interest payment on restitution. The restitution sum to accrue at the rate set by the court or of twelve percent (12%) per annum until the restitution is paid in full. The system should allow the interest to be paid to the victim or allow interest payment to be split between the victims and various selected financial

programs such as the court fund, and/or the Restitution and Diversion Program. Outstanding interest is should roll over into principal on a monthly basis.

7. The system must allow for full, partial, and installment payments by various methods.
8. The system must generate receipts with proper identifiers and account information.
9. The system must save & be able to re-print receipts.
10. The system must allow each financial program to have the ability to sequentially number receipts separately from other financial programs.
11. The system must allow the allocation of payments to multiple financial obligations within or across financial program(s).
12. The system must be able to create payment schedules, collect payments, apply payments collected to scheduled amount due, track overdue amounts, and modify payment schedules.
13. The system must have an easy-to-use process for correcting allocation errors and reissuing vouchers.
14. The system must have an easy-to-use process for reallocating and reissuing stale-dated vouchers, such as redistributing uncashed vouchers.
15. The system must have a Bogus Check program that allows for the collection of a DA fee and bank fee in addition to the restitution amount owed to the victim. The system should automate the entry of fees and associate them with specific bogus checks.
16. The system must have a Drug Fund/Forfeiture Program to issue payments to multiple law enforcement agencies. The system should be able to maintain accounting of the payments to those outside agencies, as well as the DA's share of the proceeds.
17. The system must have a State Witness Reimbursement program to allow payments to be issued for witness fees, mileage, airfare, per diem, lodging, and expert witness fees. The system should be able to generate payments and keep an accounting of that fund.

9. Feature Requirements

1. The system must be able to maintain and track a minimum of 50 addresses, 50 phone numbers, and 50 email addresses for any person.
2. The system must be able to generate a printable detailed case involvement sheet for each defendant.

3. The system must allow users to view all of a person's cases, aliases, and their role in each case (e.g., defendant, witness, victim) on one screen.
4. The system must store a minimum of 25 aliases for each person.
5. The system must allow for a minimum of 250 witnesses per case.
6. The system must allow for a minimum of 150 charges (counts) per case.
7. The system must visually designate if a person is a juvenile or youthful offender by record type as well as age.
8. The system must be able to associate law enforcement incident numbers from multiple law enforcement agencies with County Court case numbers.
9. The system must be able to provide the ability to create, activate, and deactivate case warning functions and notices (e.g., sealed cases, expunged records, warrants) based on defined business rules.
10. The system must permit users to designate cases with special scheduling needs (e.g., interpreter needed, travel arrangements).
11. The system must provide notification, alert, and prompt capability including the ability to identify events coming due or overdue, periods about to expire or expired, and events of which user should be aware based on user defined business rules.
12. The system must allow users to define structure, content, and frequency with which system displays notifications, alerts, and prompts.
13. The system must allow users to view all cases associated to a name and from this view allow users to go directly to a chosen case.
14. The system must implement a person search capability to search any name in the system including defendant, victim, witness, prosecutor, defense attorney, and judge and allow users to view all cases associated with a particular name.
15. The system must provide comments and notes fields that have a minimum of 2,500-character entry capacity on name and case data entry screens.
16. The system must allow for multiple additional numbers to be associated with a case, charge, and name (e.g., multiple SSNs, driver's license numbers, law enforcement agency-defined numbers).
17. The system must allow for additional system-generated numbers to be associated with a case or name.

18. The system must be able to categorize a case with multiple case categories (e.g., DUI, Domestic Violence, Drug, Death Penalty case, etc.)
19. The system must provide search capabilities for multiple screens and fields.
20. The system must allow the user to easily repeat similar charging language for cases with multiple charges (counts).
21. The system must be able to maintain a record of a defendant's rules of probation, including any special conditions of probation, and any special conditions of bond imposed upon a defendant.
22. The system must be able to track event information.
23. The system must allow users to associate an involved person's events to a case.
24. The system must provide the ability to automatically assign cases to a staff attorney based upon user-defined business rules based on such criteria as case type and assigned judge, as well as the ability to manually assign and re-assign cases.
25. The system must be able to track progress, compliance, and completion on referrals for services and programs (e.g., treatment, counseling, education, employment, etc.), and allow for the auto-creation of user defined documents, reports, events, and notifications based upon progress, compliance, and referral status.

10. Juvenile Records Requirements

1. The system must be able to maintain and track juvenile delinquent and juvenile deprived cases in a manner similar to adult criminal cases but with the procedures, forms, deadlines, and hearings unique to juvenile delinquent or deprived actions. Please describe the system's juvenile delinquent and juvenile deprived case functionality that is unique to those case types.
2. The system must be able to maintain and track open records requests similar to other cases but with the procedures and forms unique to open records requests.
3. The system must be able to maintain and track requests for DA legal services from county officials similar to other cases but with the procedures, forms, and legal services unique to the DA's general counsel function.

11. VOCA Requirements

1. The system must provide victimization, special classification, and victim services entry to allow VOCA reporting.

2. The system must keep records confidential/private on each crime victim that receives services.
3. The system must allow linking of reportable victim services with classifications for a victim.
4. The system should allow tracking of time spent providing victim services.
5. The system shall provide victims with web-based access to invoke victim rights.

12. Training Requirements

1. The supplier must provide a practice database, independent of the actual database, for training purposes.
2. The supplier must provide a detailed training schedule prior to implementation.
3. The supplier must describe the options available for post-implementation training for administrators, report creators, and end users.

13. Administrative Requirements

1. The system must be fully redundant with no single point of failure.
2. The system be designed with fault tolerance in mind at an overall application architecture level.
3. The supplier must provide data recovery and back up operations with the same real time standard met by the system.
4. The system must be scalable and must be able to grow with a linear increase in network and server load and should be able to grow in predictable scalability without needing a major infrastructure overhaul in network or server load. Amount of data should have the ability to increase substantially without degradation of performance and response time.
5. The system must provide workflow-based configuration to management case assignment, case transfer, event, progression, prioritization, alerts, calendaring, etc.
6. The workflow engine must allow privileged users to create new workflows.
7. The system must provide a configurable business-rule module that allows administrators to create new conditions and rules and attach to external web services.

8. The system must allow administrators to add and customize fields, forms, screens, tabs, headers, and labels via an intuitive user interface and without having to modify the source code.
9. The system must provide a built-in messaging and notification services for events, calendaring, sharing, and workflow progression.

14. Conversion and Customization Requirements

1. The supplier shall provide cost information for the conversion of all data including financial data from DAC's current case management system (JustWare).
2. The supplier must convert and incorporate reports from DAC's current case management system (JustWare). The supplier shall provide cost information to migrate approximately 300 reports.
3. The supplier must convert and incorporate document templates (e.g., Information document, Judgment & Sentence document, Motions (e.g., motions to Revoke/Accelerate), Subpoenas, Warrants, etc.) from DAC's current case management system (JustWare). The supplier shall provide cost information to migrate 200 JDA Documents.
4. The supplier must incorporate charging language correlated with statutes/citations into the system.

15. Logging and Recovery Requirements

1. The system must provide the ability to maintain a history of modifications to records and record deletions. This data must be linked to the criminal record element that was modified and provide the last date modified and the ID of the entity performing the modification.
2. The system must have record level audit trails and logging for case, person, disposition, event, evidence, etc.
3. The system shall provide the ability to automatically log all transactions. This log must maintain at least five years of data, plus the current year, online and allow for log archiving.
4. The system must provide the ability to maintain a history of transactions, including submissions, inquiries, and releases of information.
5. The system must log all successful and unsuccessful attempts to access the PCMS data.
6. The system shall produce and track data dissemination history, including recipients, record subjects, dissemination dates, and document contents.

7. The system must provide the ability to record, store, and display error messages received or produced. In addition, the system must provide the ability to produce these messages in a report or file or deliver them as an alert message to DAC's technical staff monitoring the system.
8. The system shall provide the ability to automatically record statistics about the volume and type of activities performed and the volume and type of documents processed by each person using the PCMS.
9. The system must provide/utilize robust system backup/archiving tools and strategies.
10. The system must provide strategy and capability for disaster recovery.
11. The system must provide system database rollback tools and strategies
12. The system must provide system transaction logging for the purposes of database recovery in the event of system failure.

16. Standard, Security and Network Requirements

1. The system must comply with the FBI Criminal Justice Information Services (CJIS) Security Policy version 5.9 and above.
2. The system must comply with the Payment Card Industry Data Security Standards (PCI DSS) when applicable.
3. The system must comply with the Health Insurance Portability and Accountability Act (HIPAA) when applicable.
4. The supplier must use Trade Agreements Act (TAA) compliant equipment.
5. For hosted/cloud-based system, the supplier must utilize FedRAMP-certified service provider.
6. The system must provide or support Active Directory integration and two-factor authentication.
7. The system must provide the ability to authenticate all users prior to access and dissemination of information.
8. The system must provide the ability to effectively control access to confidential data, as defined by established access policies for authorized users as well as dictated by the nature of the information requested from the system.

9. The system must control access to networks, application capabilities, and data by work group, user type, and specific user.
10. The system must have user management and control features restricted by security level settings.
11. The system must provide the ability to specify and implement an automatic log-off managed by a configurable inactive session setting.
12. If the supplier provides a mobile app, the system must support authentication of mobile platforms such as phones and tablets.
13. The system must support secure electronic transmission.
14. The system should have the ability to partition data to limit user access and enforce confidentiality.
15. The system should enforce security based on the type of case, for example, access to juvenile data should be restricted to certain authorized users and/or groups.
16. The system should provide security on (viewing/modifying/inserting/deleting) fields, coded values.
17. The system should allow an authorized system administrator to define what departmental functions a user or group can access.
18. The system should provide comprehensive auditing & logging giving administrators a granular view of what data is being edited, viewed, deleted, and added by system users with date & time stamp.

17. Support Requirements

1. Supplier shall propose a system support plan with full disclosure for an on-premises system.
2. Supplier shall propose a system support plan with full disclosure for a hosted/cloud-based system.
3. Supplier must provide annually renewable support and maintenance contracts that include software support and regular software releases at no additional cost beyond the support and maintenance contract.
4. Supplier must provide U.S.-based software support for a minimum of 8:00 a.m. to 5:30 p.m. Central time Monday through Friday excluding state and national holidays as part of the support and annual maintenance cost.

5. Supplier must make a distinction between hardware support and software only support scope.
6. Supplier must propose a system support plan for on-call coverage.
7. Supplier must provide a list of all required third-party software not supported by the supplier.
8. Supplier must provide a system support escalation plan and related support metrics.
9. Should local, state, or federal laws change requiring modifications to the applicable software, supplier must agree to make the required changes in a timely fashion or provide DAC IT with the ability to timely modify the software without programming capability.

18. Interface Development Requirements

1. **Law Enforcement Incident Referral (Case Intake) Interface** - The system must provide a NIEM (National Information Exchange Model)-based law enforcement interface to receive case reports from law enforcement agencies; this interface would allow a participating LE agency to submit incident reports from LE Records Management System (RMS) to the PCMS. The interface will electronically import incident information such as reporting and submitting agency information, defendant information, associated victim and witness records, charges, documents, and other relevant information linked to the arrest/incident. The automated process will analyze and validate the data for completeness and accuracy and return the meaningful errors via the interface. Successfully processed information will be presented as a case intake list for the DA staff to review, make necessary modifications, and then import the case into the PCMS. Please refer to Exhibit B titled *LE Incident Referral - Case Intake.docx*.
2. **OSBI ADRS Interface** - The system shall automatically send a final disposition information to OSBI's Automated Disposition Reporting System (ADRS) by exporting disposition data to a file in a CSV format. The extract must comply with the ADRS ICD. Please refer to Exhibit C titled *ICD ADRS Reporting-guidelines-rev-03-13-2018*.
3. **OSBI RAPUP Interface** - The system shall interface with OSBI's new Record of Arrest and Prosecution Update Portal (RAPUP). The integration will be bidirectional. This interface should search, display, and import arrest information from RAPUP and submit final disposition data in real-time. Please refer to Exhibit D titled *ICD - RAPUP*.
4. **ODIS Incident Referral Interface** - The provider must deploy a web service interface to integrate with the OSBI's Offender Data Information System (ODIS); Currently, ODIS has a web service interface that can electronically return an incident and incident payload in custom XML format. Please refer to Exhibit E titled *ICD - ODIS*.

5. **Court e-Filing Interface** - The system must provide a web service based or similar interface to allow criminal case e-filing/transfer to help streamline court operations. Please refer to Exhibit F titled *Court e-Filing*.
6. **DOC ICON Interface** - The system shall provide for the ability to interface with DOC's new Offender Management System, aka ICON. The integration will be bidirectional. The PCMS should query DOC's system to retrieve a defendant's disciplinary records, incarceration history, prior suspended cases and determine if in custody or under supervision. The PCMS should also allow DOC to submit Pre-Sentence Investigation (PSI), violations, and supplemental reports electronically and retrieve Judgement and Sentence from the PCMS. Please refer to Exhibit G titled *DOC ICON*.
7. The system shall provide for the ability to interface with external evidence management systems such as Evidence.com, ccaches.com, Motorola Solutions, etc.
8. The system shall provide for the ability to interface with an accounting/billing software package or service for processing fees and refunds.
9. Once developed, each interface above must be easily configurable via a configuration file or GUI and easily deployable to each district's PCMS server implementation with no additional costs.
10. The system shall support non-proprietary standards such as NIEM and GJXDM for interface development.
11. The supplier must provide fixed pricing information for the above interfaces.
12. The supplier shall propose fixed cost pricing for up to five (5) additional web service interfaces.
19. **Performance Requirements**
Supplier shall provide a test approach for testing concurrent sessions on the application in an automated fashion. The performance tests will be conducted on network environment that minimizes network latency.
20. **Acceptance Testing**
 1. **Functional Testing:** The supplier is responsible for demonstrating the functional requirements that are listed in this RFP as a minimum and further shall demonstrate standard functionality stated in the Product literature.
 2. **Performance Testing:** The supplier is responsible for preparing the test plan and conducting the test in conjunction with DAC IT personnel until satisfaction is achieved. In the event where satisfactory performance as agreed on the ATP is NOT achieved; DAC may seek other remedies as provided by applicable state laws.

3. **Availability Testing:** The supplier is responsible, in conjunction with DAC, to conduct this test for a period of 3 weeks while the system is in full production. The results shall document that the deployed software components run with predictable results and uptime while full load of work is being conducted.

21. **Documentation and Training**

The objective of the training plan is to provide orientation and training for DAC personnel at all levels, including management, supervisors, operations staff, programmers, DBAs, and user instructors for tactical and analytical operations. DAC understands that the success of this project depends on the level of initial training provided to all personnel. Effective methods of training to pass the basic knowledge needed for our personnel to effectively use the system and associated tools is a key measure of successful implementation of the program.

The Supplier shall prepare a training plan that will consist of at least the following sections:

1. **Concept description:** defines the general approach for accomplishing the proposed training program. This section shall define the development schedule and the responsibilities of DAC and the Supplier.
2. **Course schedule:** defines a schedule for the instruction phase and the “on the job training” phases of the program. The schedule shall identify the starting and completion dates for each classroom course and the date on which all course material will be available for review.
3. **Course description:** this part shall include a summary description of each course to be taught during the instructional phase of the program. The description shall include the subject, objectives, course length and number of sessions. In addition, the number of students in each class and the recommended background and skill level necessary for satisfactory completion of the course shall be indicated.
4. **Course material:** summary of the quantity and type of training material proposed for each course.

Supplier shall be responsible for providing technical and functional training to personnel who will be operating, using and supporting the technical maintenance of the system.

5. **Technical training:** shall consist of providing training to computer programmers and DBAs; system analysts and computer operations personnel to enable them to operate and support post turnover tasks.
6. **Functional training:** shall provide training to those individuals responsible for administrative tasks, those responsible for analytical tasks, and those responsible for data entry and generation of reports. This training must be able to convey to workstation

personnel the “man-machine” interfaces, including the requirements for inputting data, edit criteria, specific actions required by the system and the use of the output data.

7. Supplier shall prepare course outlines, training schedule and submit them to for review by DAC staff no later than 30 days prior to the start of the course.

22. Invoicing and Payment

1. First Payment of 5% of the agreed upon cost can be invoiced after initial implementation plan, training plan and test plan are approved for the first District.
2. Second Payment of 5% of the agreed upon cost can be invoiced after software is installed, hardware is configured, converted data is installed and the application is operational within the stated functional specification for the first District.
3. Third Payment of 5% of the agreed upon cost can be invoiced after completion of UAT tests, completion of performance testing, production testing, and system go-live are satisfactorily accepted by the first District.
4. Fourth and Proceeding Payments of 2.5% of the agreed upon cost can be invoiced after each remaining district and the AG’s office has completed the planning, training, UAT, performance testing, production testing and is live on the new system.
5. Final Payment of 20% of the agreed upon cost can be invoiced after successful completion of production testing and successful functionality of all PCMS interfaces.
6. The Supplier will invoice for software maintenance either monthly or quarterly in arrears of services provided. The supplier will send one (1) copy of their invoice bearing the purchase order number and amount due to:

District Attorneys Council
Attn: Finance Department
421 N.W. 13th Street, Suite 290
Oklahoma City, OK 73103