



Department of Purchasing & Contract Compliance

Felicia Strong-Whitaker, *Interim Director*

July 16, 2009

Re: 09RFP68792YB-CL (EDMS) Electronic Data Management System

Dear Proposers:

Attached is one (1) copy of Addendum 1, hereby made a part of the above referenced Proposal (RFP).

Except as provided herein, all terms and conditions in the Proposal (RFP) referenced above remain unchanged and in full force and effect.

Sincerely,

Charles Leonard, C.P.P.B.

Charles Leonard, CPPB
Chief Assistant Purchasing Agent

Winner 2000 - 2008 Achievement of Excellence in
Procurement Award • National Purchasing Institute



**09RFP68792YB-CL (EDMS) Electronic Data Management System
Addendum No. 1
Page Two**

This Addendum forms a part of the contract documents and **modifies** the original RFP documents as noted below:

The following questions were posed of the aforementioned RFP project; additionally, please see the revised functional requirements text (Indexing/ Proofing/ Verification – Sections 4.1 to 4.45, E-Filing – Sections 10.1 to 10.18 *section 20 of the requirements matrix was inadvertently omitted, please complete*.

Responses to Questions: EDMS 09RFP68792BY-CL

1. In order to plan for and adequately price the project, the following information is provided:

a. Demographics of County users by roles

General Public, Attorneys, Students, Title Searchers, Collection Agencies

b. Total number of anticipated users of the system

In-house functional = 90 users

c. Total number of anticipated public users

Daily usage anywhere from 50 to 100 people daily (Estimate)

2. Is conversion of the existing database a part of the project? If yes, then we need:

Volume Information	Estimate for year: 2009	Projected for year: 2010
Number of Pages	1,400,000	2,000,000
Total Instruments Filed and Recorded	400,000	550,000
Number of Images	1,400,000	2,000,000

Current Workflow Automation

1. Current System

MLC Real Estate System

2. Current Database Oracle 10g
3. Images currently stored: Inside the database (blobs) Outside the database (file level)
(Iron Data)

If outside the database, see file structure format below:

-
4. Images stored as: Group IV single page TIFFs X Multi page TIFF's Other
5. Images scanned at: 200dpi 300dpi Other:
3. *We would like to get clarification on page 4-68 where the county states: "Vendor must provide an indexed video file within 24 hours of each Commission Meeting. Vendor may provide an optional video stream if so desired... ". Is it the County's desire that the Vendor provide staff to index Video sessions, or to provide a means to store the session within the database along with a means to retrieve it?*

No. This section can be omitted.

Requirements matrix

- a. 3.7 - Is this a requirement for services or simply asking if the system has the capability?

Yes, it is a requirement.

- b. 3.8 – Does the county currently have an archive writer, or are you requesting us to provide a quote for one?

Currently, we have two (2) Archive writers on site.

- c. 3.9 –Is the county requesting services to scan and index the Assessors Pages or are you requesting the capability to store the data?

Standard for GSCCCA (Georgia Superior Court Clerk's Cooperative Authority)

- d. 4.13 –The requirements notes "see N2-12 in the table"- where is this located?

It is a part of the standard for GSCCCA

- e. 4.34 – Can the county clarify this requirement?

Documents should automatically link

- f. 8.1 States: The system must maintain all current internet capabilities and integrate with the a plan scanning system through 2004 – See Appendices”- the Appendices is not in the RFP

“The system must maintain all current internet capabilities and integrate with a plat scanning system through 2004.”

- g. 18.0 – Please confirm that all data that is requested to be searched is indexed within the Land Records System. This appears to be information from different systems / offices.

Please reference section 14, 15 and 16

No.	Requirement Description	Response E/M/P/O/C/X	Comments
1	Recording/Cashiering/Accounting		
1.1	System should have "Help" procedures available built in to the system. Employees should be able to enter a document type and bring up information on what is needed to record the document. Information on transfer tax and intangible tax should also be available to the cashier. Ability to make changes and/or delete/add procedures to be done by an administrator.		
1.2	The system must be easy for cashiers with basic PC and Microsoft Windows skills to learn and operate.		
1.3	The system must seamlessly integrate cashiering workstations and all required functions.		
1.4	The system must support cashiering operation for all document types received by the Clerk's Office.		
1.5	Cashiering module should allow Operator to capture the name and address of person or firm submitting the document(s). Operator must be able to choose between manually keying the name, and selecting a valid name from a custom table.		
1.6	Cashiering module must require Operator to enter document type and number of pages.		
1.7	When recording a document, Operator must be allowed to either manually key the document type or invoke the document type table for selection of a valid entry. If manually keyed, the document type must be validated against the type table.		

1.8	Operator must be able to manually key in the document name as presented and the table will choose the document type from the table. Operator can accept the system choice or choose a document type from the table.		
1.9	Must provide for a separate document type for real property tax FIFAs and real property tax FIFA cancellations, with a field to index the tax parcel identification number.		
1.10	System must allow as a supervisor/administrator function, the ability to add/delete modify document types and make changes in fees.		
1.11	The system must allow the cashier to suspend a batch so a customer at the window may be assisted then return to the suspended batch to complete the transaction.		
1.12	The cashiering module must reference user-defined table(s) to determine correct calculations for fees and taxes due. Depending on document type, the cashiering module will require the operator to input the number of document pages, number of names and/or other descriptions, which shall be used to automatically determine the correct fee(s).		
1.13	The computed fees and taxes must be displayed on the cashiering workstation. Each fee should be accessible for display.		

1.14	The system must have an option to override (by a supervisor) the calculated fees. System must allow for deferred payments.		
1.15	For transactions not related to the recording process, Operator must be able to conduct a miscellaneous transaction, and enter the full amount at the keyboard.		
1.16	For refund transactions, the system must capture the name of the person or firm who is getting the refund, the amount of the refund, and the reason for the refund. Refund function by a supervisor. System must request remarks to enter reason for a refund.		
1.17	The system must provide a method to list all override reasons or allow text input. The system must store the override reason as part of the transaction audit trail.		
1.18	<p>The system must allow the Operator to record a document that is exempt from taxes and other fees and reset the fee to \$0.00. The system must allow the Operator to record a document that is exempt from taxes and other fees and reset the fee to \$0.00.</p> <ul style="list-style-type: none"> • The actual amount of the consideration must be recorded, but the tax on that amount is recorded as \$0.00 • The actual amount of the consideration must be recorded, but the tax on that amount is recorded as \$0.00 • The actual consideration amount is recorded and captured and the tax will be recorded on that actual amount. 		



1.19	<ul style="list-style-type: none"> The actual amount of the consideration must be recorded, but the tax on that amount is recorded as \$0.00 		
1.20	<ul style="list-style-type: none"> The actual consideration amount is recorded and captured and the tax will be recorded on that actual amount. 		
1.21	To meet the requirements for commercial account bulk recordings, the system must provide the ability to enter unlimited transactions and document types against one receipt, assigning instrument numbers in sequential order.		
1.22	For recordings, the system must provide the ability to easily duplicate filed entries between different documents		
1.23	The system must be able to automatically assign a unique identification in sequential fashion and automatically assign book and page numbers which conform to the Clerk's Office book and page requirements. This system may be system instrument numbers, bar codes or other. Vendor must consider the volume of Fulton County when proposing an identification system.		
1.24	The system must allow for back dated documents with "A" "B" CFN #s to be added and fall in date order with previously recorded documents.		



1.25	The system must have the ability to print the instrument number, data, and time as well as any other standard recording information, directly onto the documents as a part of the recording process. System must also be capable of imprinting labels for book/page numbers & clerk numbers.		
1.26	The system must generate instrument numbers, which carry the year and whose sequence portion resets each year.		
1.27	The system must automatically capture and save an official partial or completed index during the cashiering/recording/data entry process. This index shall consist of: Recording Date, Unique Time (with seconds), Document type, Instrument Number, Book number, Page Number, and first and second party names. System to use OCR for this process.		
1.28	The system should be capable of configuring the cashiering stations as multi-function stations to facilitate indexing/verifying tasks during periods of low counter volume.		
1.29	The system must carry forward all document indexing data that was both automatically captured and manually entered during the cashiering/recording process into the indexing module without requiring redundant data entry.		



1.30	The system must provide the ability to take any combination of cash payments, credit card payments, check payments or customer draw-down payment for any transaction.		
1.31	If a check is presented for payment, the system must prompt the operator to enter the check number, the check amount and the name of the payer. Checks will be scanned as they are imprinted.		
1.32	The system should provide the ability to take credit card & debt card payments for any transaction.		
1.33	The system must support the processing of missed pages within the same instrument number, for the book and page numbering scheme. System must support later additions of missed pages for a particular document. System must have ability to add documents left out of a file submitted for recording, shift the order of documents, add or delete pages and documents.		
1.34	System must be able to add after recording and provide ability for operator / cashier to cancel and redo a step without the need to void at any point during a transaction until the acceptance, approval and request for receipt.		
1.35	The system must provide the ability for the Operator to accept or reject an entire transaction after all documents and data have been entered on the screen and fees have been calculated.		
1.36	The system must hold the transaction in a suspension and create a rejection letter stating what is needed to record the document		

1.37	The rejection must be tied to a transaction so when corrections are made and submitted again the system can complete the transaction without entering all the data again.		
1.38	If the error is the fault of the filing party, the transaction will be given the file date when it is re-submitted as correct.		
1.39	If the file was rejected by the cashier and it was not faulty, the transaction will be given the original file date and time.		
1.4	Tracking numbers must be in sequence.		
1.41	Rejection process must be part of the cashiering process and not a separate program.		
1.42	Cashiers must be able to search rejection letters that are already processed by the presenter, a date range, or by check numbers of returned checks.		
1.43	System must be able to generate a report of rejections by presenter and by type of rejection.		
1.44	Rejection letters will be assigned a tracking numbers and printed by the cashiers at the cashier work station.		



1.45	Rejection reasons will be in a drop down box with a general field to enter reasons that are not in the drop down box.		
1.46	The supervisor/administrator must have the ability to add new rejection reasons to the program.		
1.47	Documents rejected for intangible tax penalty and interest will have a print out of taxes due over the next 90 days, indicating the date and tax amount will change and the new tax amount.		
1.48	The system should not generate any part of the index, including sequential Instrument Number, the Book and Page number, the unique Date and Time, until the entire transaction has been approved, the money has been taken, and the receipt has been requested.		



1.49	The system must provide the ability to void a transaction after the document has been cashiered. It is desired that this is facilitated through the Administrative interfaces. Void process by a supervisor only.		
1.50	Upon receipt of payment, the system must generate a receipt with date and time recorded, receipt number, Operator ID, instrument numbers, book/page number, detailed list of fees and taxes by instrument number, document type by instrument number, payment types and amounts, submitter name, total dollar amount tendered and total overage amount. Each completed transaction must control the opening of the cash drawer when applicable and generate a receipt. For each book and page recorded the receipt must have a break down of each cost. Each receipt will have the employee's identification number.		
1.51	The receipt should be generated by a fast, quiet thermal printer or an impact head device.		
1.52	Imprinting of book and page numbers must be available on just the first page or on every page number of the document, imprinting directly on the document and also by imprinting on labels.		
1.53	The system must capture and track detailed transaction information that can be used to create and print a detailed Audit Report. This detailed information must be sufficient for use as an additional cash-balancing tool, report distribution tool, or as an investigative tool.		

1.54	The system must provide a computerized method of placing document recorded information such as date, time, instrument number, book and page numbers, recording fee, documentary taxes and name of county on the first page of the document (i.e. Stamp, Bar Code, Labels, etc) NOTE: speed of documents handling must be accounted for in method of affixing this information.		
1.55	The system should be capable of generating a cover sheet for all document types.		
1.56	The system must be capable of handling cash, check, credit card, debit card, PayPal, and draw down accounts.		
1.57	Cashiering workstations must have the capability of endorsing and scanning checks.		
1.58	The following minimum types of security and audit(s) must be supported for the cashiering module:		
1.59	• Sign-on Password Security		
1.60	• Operator ID stored and logged with all transactions		
1.61	The system must provide workflow process improvements for the recording of all types of plans.		
1.62	The system should be able to facilitate the Realty Transfer Tax re-determination process.		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
2	Cashiering & Reporting		
2.1	All cashiering reports must allow for date and time selection to produce daily, weekly, monthly, quarterly, semi-annual and annual reporting. Time selection is important to allow the County to balance several times per day.		
2.2	The system must provide accurate receipt reporting and match the current fees in the document and fee tables. Exact receipt information that was printed for the customer must also match the receipts that print through the Receipt reporting functions. The detailed receipt information must include, but not be limited to, what portion of each fee was check, cash, or billed to a "draw-down" account. These reporting functions must be available by Operator ID, or consolidated over all cashiering Operators. NOTE: the exact process of implementation may be flexible so long as the core functionality is available.		
2.3	Must generate a report of the date mail out labels are generated, have a feature where data can be entered for the dates documents are mailed back to the filing parties.		
2.4	For each document, the system must generate a receipt with a break down of fees for each document recorded.		
2.5	Must be able to generate a mail out (return label) by entering the Clerk file number in the system		



2.6	The system must generate a Check Report. This report should list all check transactions. The information printed should include, but not be limited to: date, time, Operator ID, check number, check amount, submitter (if captured), and payer (if captured). Totals should print at the end.		
2.7	System must also generate a cash report for each cashier.		
2.8	Must have an internal messaging system, administratively driven, for correspondence between cashing, indexing, scanning, public inquiry.		
2.9	The system must provide Audit Reporting of changes made after a document is recorded. Audit information includes, but is not limited to: date, time. Operator ID, instrument number, book and page number, receipt number, submitter name, first grantor and first grantee names, document type, number of pages, county recording fees, deed consideration amount, transaction type, payment type, check number, check amount, cash amount, draw-down amount, name of payer, refund amount, name of person receiving refund, and void information. NOTE: Vendor should clearly define the reporting interface and functionality (i.e. Crystal reports, embedded, proprietary or other).		
2.10	All modifications mandated by new GA state laws or due to requests from GSCCCA must be done at no cost to the County and must be done within 30 days of the request.		
2.11	The audit reporting function must be available by Operator ID, or consolidated over all cashing Operators.		
2.12	The system must generate a Missing Instrument Number Report. This report should include, but not be limited to: all voided transactions, along with Operator ID, date and time.		



2.13	The system must be capable of producing a Void Report. This report should include, but not be limited to: date, time, Operator ID, instrument number, book and page numbers, and other transaction details. This report should be available by Operator ID, or consolidated over all cashiering operators.		
2.14	The system must provide a Cash Balancing Report. This report(s) should be available in summary and detail format. This report must include, but not be limited to: totals for recording fees, totals for transfer taxes, totals for each document type, totals for each payment type, totals for each transaction type, totals for each account type, back deposit amount, and total number of transactions. This report must be available by Operator ID or consolidated for all cashiering Operators.		
2.15	The Cash Balancing Report function must provide detailed report(s) by Operator ID that include, but are not limited to: date and time, instrument number, book and page number, receipt number, submitter name, document type, number of pages, recording fees, consideration amount, transfer tax, transaction type, payment type, check number, check amount, cash amount, draw-down amount, and deposit amount.		
2.16	The system must provide Summary Reporting capabilities. The Summary Reports must include total number of documents recorded in a given date range. Total must be broken down by document type. Total deed consideration amount for the date range should print as well. Reports must also have a breakdown of fees collected for various agencies.		
2.17	The system must provide workflow process improvements for the reporting and cashiering of all types of plans as indicated in Appendix E.		



2.18	System must generate a report of all work produce by each employee. Reports for employees must be by the number of documents filed, the number of pages filed, the number of rejections processed.		
2.19	The system should provide means for ad hoc reporting and any data/statistics captured as part of the system processes. System must provide a report of work completed in cashiering and in indexing and verifying.		
2.20	Report should list number of documents recorded, number of pages recorded, number of key strokes and number of rejections processed.		
2.21	The system must provide Accounts Receivable and Accounts Payable functions.		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
3	Scanning		
3.1	The system must support scanning of an individual document and batch scanning of subsequent indexing from multiple workstations.		
3.2	System must be capable of producing 16mm and 35 mm micro-film from TIFF or PDF images that were e-filed and micro-film paper filings from scanned images.		
3.3	Reports to be generated for each employee on number of pages and number of documents scanned.		
3.4	System shall mark each image with the book and page number at the bottom of each page, creating space as needed.		
3.5	The system must automatically link document image(s) to the corresponding partial index.		
3.6	The system must support batch scanning for subsequent indexing at multiple workstations.		
3.7	<p>System must include back scanning of all indices and images prior to 1980. The system must support batch scanning for subsequent indexing at multiple workstations.</p> <ul style="list-style-type: none"> System must include back scanning of all indices and images prior to 1980. <ul style="list-style-type: none"> 190,000 index page images 800,000 deed page images 		



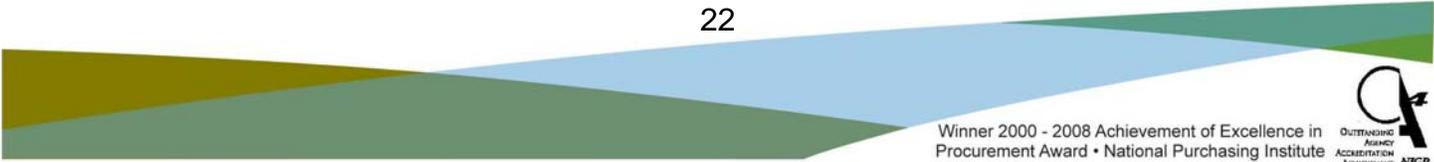
	25,500 plat and condo plat images		
3.8	System must provide for the scanning of plats and using the scanned image to make 35 mm film of scanned plats on site. System to use archive writer to create 16 mm microfilm of documents (other than plats /floor plans).		
3.9	System shall provide for the scanning and indexing of all tax assessor field books. 90,000 tax assessor field book images.		
3.10	System must have the ability to redact information.		
3.11	System should be capable of OCR (optical character recognition) to locate information for the purpose of redaction. Redaction function should be available at indexing, verifying and scanning steps.		
3.12	Items will move through to the indexing verification phase in the same manner as new filings. Reports of back dated documents filed in this manner will be generated.		
3.13	System must validate the number of pages scanned against the manually entered document page count and provide means for correction as required.		
3.14	The system must provide some means of image sharpening to remove specks as well as adjust resolution.		
3.15	Scanned images should be available for printing as soon as they are scanned and burned, before indexing and verifying.		



3.16	The system must provide a detailed method for validating and correcting inconsistencies between scanned page count and manually entered page counts.		
3.17	The system must allow a multi-page document to be recorded under a single document index.		
3.18	The system must allow appending and insertion of additional pages to existing documents. These new insertions would be missing pages within a book and page numbering scheme.		
3.19	The system must permit appending, insertion and deletion of pages to previously scanned documents without requiring the entire document to be re-scanned.		
3.20	The system should employ industry standard scanners.		
3.21	The system must support the scanning and viewing of all documents sizes currently in use in the Records Office.		
3.22	The system must support the various paper weights and qualities as currently in use in the Clerk's Office.		
3.23	The system must support both simplex and duplex scanning.		
3.24	Ability to scan a mixture of simplex and duplex without having to take the duplex pages out and scan them separately.		



3.25	The system must support the use of bar codes for system scanning. NOTE: County recording transaction volumes must be accounted for in systems design and implementation.		
3.26	The system architecture and workflow processes must be easily scalable and flexible to allow for “fine tuning” of the process post-deployment.		
3.27	Scanning Stations proposed as part of the system must be easily operated with basic PC skills and little or no prior imaging experience.		
3.28	The system must employ leading industry standards for digital image storage. This storage must be scalable, very reliable and manageable.		
3.29	The system must provide means for copying a specific range of instruments numbers and related data (including index and digital images) to CD ROM or equivalent means to distribution outside the Recorder’s Office.		
3.30	The system should allow, if desired, the document to be scanned the same time money is transferred for the initial recording. (i.e. at the cashiers counter)		
3.31	The system should allow, if desired, the document to be scanned at the time of indexing.		



3.32	The system must provide workflow process improvements for the scanning of all types of floor plans or plats.		
3.33	The system should facilitate the scanning and retrieval of UCC documents.		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
4	Indexing/Proofing/Verification		
4.1	Indexing station must be easy to use with minimal Windows Operation system experience.		
4.2	System must be capable of split screen viewing with the document on one side and indexing fields on the other side. Screen settings to be customized by the user. Customization to include font size, colors, and locations of the fields. By user log in, not by location.		
4.3	The system must provide a flexible means to retrieve documents from the workflow queue that are ready for indexing and/or verification. The system should allow for any, but not be limited to, the following information to be used for queue retrieval: Instrument number, book and page number, document type, document status (i.e. unverified)		
4.4	Must have the standard features of zoom, rubber band, magnifying glass, rotate, page navigation, page back and forth, document back and forth, by mouse and hot key navigation.		
4.5	The system must display all partial index information for each document and prompt the Operator for the additional indexing fields relevant to that document type.		
4.6	Display screen must prompt by highlighting required fields needed to index certain document types. Mark certain fields required in each process. Alert employee of fields that must be completed before moving to the next field.		



4.7	Edit and corrections- for documents filed prior to year 2000 indexing / verifying must be able to change document type as a supervisor function.		
4.8	Must be able to index alpha numeric district numbers and land lot numbers, must be able to index alpha-numeric and numeric-alpha (index as presented by the filing party)		
4.9	<p>Must also have a field to index section numbers for the first and second districts.</p> <p>EX 1st district, 1st section</p> <p>1st district 2nd section</p> <p>2nd district 1st section</p> <p>2nd district 2nd section</p> <p>Must have separate fields for district #, section #, land lot #, block letter or #, lot letter or #, phase letter or #, unit letter or #, subdivision/condo name, street address, general info.</p>		
4.10	System must have automated indexing (OCR) capability		
4.11	County must be capable of designating sealed document types in the system. System must automatically seal any document that is entered and recorded as a document that is classified as sealed, Without the clerk taking additional action to seal the document.		
4.12	The system must allow frequently-used names to be retrieved from user-defined tables, as well as manually keyed.		



4.13	<p>The only characters to be entered are:</p> <p>Character Usage</p> <p>Space use in any name Single spaces</p> <p>only</p> <p>! exclamation point use in business names</p> <p># pound or number sign use in business names</p> <p>\$ dollar sign use in business names</p> <p>% percent sign use in business names</p> <p>& ampersand use in business names</p> <p>* asterisk use in any name</p> <p>, comma use only to separate human surnames from given names otherwise ignore</p> <p>/ forward hash (slash) See table in N2-12 for usage</p> <p>0 through 9 (Arabic numerals) use in any name</p> <p>A through Z (alphabetic letters) use in any name</p> <p>& Ampersand precede and follow by a space when between characters and words or words and words do not precede or follow by a space when between characters not amounting to words</p> <p>/ virgule, hash or forward slash index for fractions and dates within names</p>		
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4.14	Reports to be generated on changes & corrections made to the indexed data.		
4.15	Reports to be made in the indexed and verifying programs as to what was originally keyed as what was changed in verification.		
4.16	Reports also made of data changed after it was released to public inquiry. The identification number of the indexer and verifier who entered the data must always be available to a supervisor/administrator		
4.17	Ability to view and/or print any related reports as needed as in tracking and audit.		
4.18	The system must provide workflow process improvements for the indexing, proofing and verification of all types of floor plans and plats.		
4.19	The header of each page of the Index reports should print the filter and sort order in place for that specific report compilation. The report should use a cover page with name of county, filter options, sort order in place for the specific report and date printed.		
4.20	System must have an audit trail so a supervisor can tell the name of the employee who indexed and verified each document. System must be capable of generating a report that list the number of documents keyed by each employee. Must also produce reports on the number of key strokes of each employee, the number grantors or grantees, the number of cross reference entries, the number of legal descriptions.		
4.21	The system must provide for basic Windows based application functionality including:		



	<ul style="list-style-type: none"> • Support for hot key switching between opened module, screens and application • Drop down or pop up interfaces for all table driven data entry points in all modules • Support for hot key switching between opened module, screens and application • Drop down or pop up interfaces for all table driven data entry points in all modules 		
4.22	The system must automatically set the document status flag (or equivalent) from “unverified” to “verified” (or equivalent) when verification process has been completed.		
4.23	Ability to release documents to public inquiry immediately when verified without waiting for the instruments to release in exact CFN order.		
4.24	The system must be capable of generating a Verification Report according to specified date and time range or other criteria.		
4.25	The system (specifically, workflow process) must maintain a consistent set of rules and processing commands between indexing and verification modules. This includes all editing controls as well as field duplication controls. Vendor should describe in detail the proposed workflow verification processes.		



4.26	Supervisor must be able to return a document that was directed to verification back to the original the indexer for corrections.		
4.27	Copy & paste names from one field to the next.		
4.28	Copy all names from grantor to grantee and back and forth as requested.		
4.29	Create a County generated drop down menu in the document legal field for subdivisions.		
4.30	Import – Allow employee to type out grantor/grantee names in a note pad file and import copy/paste into index fields.		
4.31	The system must update the Last Date changed field (or equivalent) for a document index upon any change to a verified document.		
4.32	If corrections must be made to the data, after the correction is made, the system will put the date and time of the correction in a manner so it can be viewed on the index screen in public inquiry. System will note on public inquiry exactly what was added as a correction to the index. Data that was incorrectly entered will not be deleted. All comments added on a correction must be displayed in public inquiry. Ability to make any and all changes needed in the index/verify program to release a document to public inquiry.		
4.33	<p>The capability to verify any place...5 names indexed 13452 verified 12345 – system compare data, not placement and flag correct. .</p> <p>EX: Index -3 grantors – Smith, Jones, Brown,</p> <p>Verify - Smith, Brown, Jones</p> <p>They are not in the same order, but the data is the same.</p>		

	<p>Or index Williams, Edwards, Coffelt and omit the name Clark</p> <p>Then verify Clark, Williams, Edwards, Coffelt</p> <p>They are not in the same order, but the data is the same.</p>		
4.34	Cross reference of related documents – when indexing the book and page number of related documents, the system must automatically relate the book and page number of the original document to the new document. The system should electronically stamp the book and page number of the new link on the first page of the image of the original document.		
4.35	System must have a training program for new indexing employees with information on tabs at the top of the display screen with training and instruction. Ability for the County to create customized help screens for training purposes.		
4.36	Verification employee must have the ability to view at least 70 character indexed to compare indexed to verified documents.		
4.37	Capability to assign certain documents types for the purpose of training. Filter documents base on the training level of the employee. Documents to be held in a queue and routed to a designated trainer or supervisor of evaluation and/or verification.		
4.38	When changes/corrections are made the system will flag the change and hold in a queue for review and release by a supervisor.		



4.39	System will automatically assign the date & time the entry was added, modified, corrected and this information will be viewed on the index in public inquiry.		
4.40	System must be capable of allowing the re-recording of documents that did not convert in years prior to year 2000. System must allow the recording with the original file date; manually assign the document type, book, page number and filing date and time. Fees are not required.		
4.41	Items will move through to the indexing verification phase in the same manner as new filings. Reports of back dated documents filed in this manner will be generated.		
4.42	The system must be able to display the scanned image and the index screen on the monitor in separate windows that the user can re-size as desired and easily switch between.		
4.43	The system should ensure that the separate windows used throughout the application are designed with user-friendliness in mind. Specifically, individual windows of the system should not open on top of a previous window in such fashion that the user (Operator) must manually reposition the window to continue document recording.		
4.44	The capability to hold complete (verified documents) in queue to be released (transmitted) at will to GSCCCA without added steps of building. <u>(Very important function, this is tied into funding)</u>		



4.45 System must allow an option to alert the employee to review such entries that start with **The, A, Estate, Trustee, Sheriff.**



No.	Requirement Description	Response E/M/P/O/C/X	Comments
5	Public Access and General Document Retrieval		
5.1	Index search functions must be simple for the general public to use, without needing additional training beyond the initial training period as conducted as part of the initial deployment of the new system.		
5.2	Font size no smaller than a 12 for index data. Images of documents to be displayed at least 85% size for all images except plats.		
5.3	At the top of the screen, the name/names the user submitted for research must be displayed, so the user can review and double check his request as he reviews the index.		
5.4	Data detail to be displayed only at the request of user.		
5.5	Public access stations must allow the public to log on with username and password to deduct fees incurred from document printing from a draw-down account. They should also allow payment via debit type card or PIN pad when customers are receiving copies from the back area printers. Prints are to be held in queue and not released until payment is finalized.		
5.6	Internal one way messaging should be available to public users who are logged on to a workstation, so the user can easily and quickly communicate to the County staff about errors found in the public records. EX: User can advise staff of an alleged index error; An automatic response will be displayed.		



5.7	System must have an option to sort by a single year by exact filing date and time or sort multiple years by exact filing date and time but default search will be as described in elsewhere.		
5.8	The system must provide the public with full featured and complete index search functions for use in public retrieval of specified documents.		
5.9	Public inquiry should be able to display all data indexed for each search type. Ex if the document has a book and page reference and a legal description, both will be displayed whether the search is by book and page # or by name search.		
5.10	The system must provide capability to search names by a combination of last and first names. (not only Walker, but also Walker Robert and Walker R)		
5.11	System can search with or without a comma after the last name, compress. Delete, strip spaces, strip commas and periods.		



5.12	<p>The system must support searches for any of the following index search arguments: The system must support searches for any of the following index search arguments:</p> <ul style="list-style-type: none"> • Name of Party (grantor and/or grantee) • Two Party Name Search • Name of Company • Document/instrument type • Book type • Book & Page Search • Legal description by district #, and /or section # & land lot # • Block/pod and Lot Search (alpha & numeric) • Unit • Phase • Tax parcel ID # - (for real property tax FIFAs) • Recording date range search • Street address or just street name without a street number • Subdivision name • Condo name <ul style="list-style-type: none"> • Name of Party (grantor and/or grantee) 		
5.13	Must be able to search land district 1 and land district 2 with and without a section number.		



5.14	<p>System shall have a search in which a name and at least 8 variations of the name can be entered and an index retrieved that is sorted by land district number, land lot number, block number or letter, lot number or letter, unit number and/or subdivision name. EX: Search the following name variations:</p> <p>John Wieland Homes</p> <p>John Weiland Homes</p> <p>Wieland John Homes</p> <p>Weiland John Homes</p> <p>Or search:</p> <p>Sheppard John</p> <p>Sheppard J</p> <p>Sheppard Johnny</p> <p>Shepard John</p> <p>Shepard John</p> <p>Shepperd J</p> <p>Shepperd Jon</p> <p>Shepperd Jonny</p>		
5.15	<p>System shall have a search option to roll year by year at the users request, by grantor, grantee or both grantor & grantee. Roll years forward and backward.</p>		
5.16	<p>System must support searches containing any combination of the following index search filters: following index search filters:</p> <ul style="list-style-type: none"> From/To Range for Recording Dates, or all (Default should be "all") 		



	<ul style="list-style-type: none"> • One Document Type selection, or all (Default should be “all”) 		
5.17	For index fields that are supported by a user-maintained table (such as document type, and party type), system must allow user to invoke a display of valid table values to assist in defining the search filters.		
5.18	<p>User must be able to sort data by any field.</p> <ul style="list-style-type: none"> • Sort by alpha numeric legal descriptions in the following order district #, land lot #, lot #, block # or letter, unit #, phase #, pod #, • By book & page reference # • By street address • By parcel ID # (for real property tax FIFA's) • By filing date & time 		
5.19	<p>System must search records by entering a date range and then displaying each calendar year</p> <ul style="list-style-type: none"> • Ex: gtor 1990 then go to 1991 then 1992 and so on, system will “roll through” each year & sort data in an alpha numeric display with out using xx/xx/xxx, user must be able to enter just the years 1980-1981-1982 ect up through the current year. 		
5.20	<p>System shall have a default index that displays as follows: Gtor-Grtee –doc type-date-time-dist-LL#-bockl-lot-address or sub name</p> <p>Book/page #, if the subdivision name and book/page reference are both available, the book and page # will be viewed, (clerk file # is not necessary on the index page)</p>		



5.21	<p>The system must be capable of producing reports for any documents that have been fully or partially indexed. These Printable Index Reports must be viewable and printable by:</p> <ul style="list-style-type: none"> • Recording date/time range • Direct and indirect party names • Book and Page number • Deed consideration (data from transfer tax module in recording) • Loan amount (data from intangible tax calculation in recording module) • Block and Lot • Unit • Phase • Document type • Street address, (if indexed) • Tax parcel ID # • Subdivision name • Block and Lot • Unit • Phase 		
5.22	<p>The index page on the public inquiry must be sorted as follows from left to right for each filed:</p> <ol style="list-style-type: none"> 1. grantor or grantee 2. grantor or grantee 3. type of instrument 4. date 5. time 		



	<p>6. district #</p> <p>7. section # (if applicable)</p> <p>8. land lot</p> <p>9. block or pod (alpha or numeric)</p> <p>10. lot (alpha and/or numeric)</p> <p>11. book and page reference field</p> <p>12. address or subdivision/condo name</p> <p>The Clerk ID number/file number does not need to be displayed. The system must sort data as follows,</p> <p>1st – if there is a book and page number reference, this field is displayed in numeric order of the book/page numbers (see #11 above)</p> <p>2nd - by district number (alpha and/or numeric)</p> <p>3rd – by land lot number (alpha and/or numeric)</p> <p>4th - block or pod (alpha or numeric)</p> <p>5th - lot (alpha and/or numeric)</p>		
5.23	Must accommodate alpha-numeric district and land lot numbers and numeric-alpha district and land lot number and strip / delete spaces.		
5.24	<p>Able to compress, delete, strip commas and spaces.</p> <p>EX district # 14 F, 14 FF, 9 C, 9 F</p> <p>When searching 14 F, system should also search:</p> <p>14F</p> <p>14 F</p> <p>14 FF</p> <p>14F F</p>		



	<p>14 F F</p> <p>When searching the 9th district, the system should also search: 9F</p> <p>9 F</p> <p>9C</p> <p>9 C</p> <p>When searching the 8th district, the system should also search</p> <p>8 C</p> <p>8C</p>		
5.25	System must support the ability to abort a search at any time.		
5.26	<p>Should provide for a “general public search or quick easy search” so a citizen can easily access information with a list of questions such as:</p> <p>What do you want to do?</p> <p>I need a copy of the deed to my house. The person would type in his name and bring up only the grantee index with WD's, QCD's, Estate deeds, etc.</p> <p>I need to see if there are liens filed against me. The person would type in his name and bring up only the lien records and lien cancellation records.</p> <p>I need a copy of the document that shows my house is paid for. System would bring up security deed cancellations.</p> <p>Clerk's staff will provide the list of what is needed for each search.</p>		



5.27	System must provide a query results screen that lists index records resulting from a query. Users should be able to retrieve expanded information about the index record.		
5.28	For each index, on a retrieved list of index records, system must display a comment stating, "See document detail".		
5.29	System must provide the ability for a user to select from the retrieved list of index records one document at a time for full image display.		
5.30	System must provide the ability for a user to return to index reference screen without viewing all selected documents.		
5.31	System should provide the ability for a user to select from the retrieved list of index records more than one document for image display. (multi-selection of records)		
5.32	System should provide the ability for a user to scroll between the images of selected documents without returning to the index reference screen.		
5.33	System must provide the ability for a user to return to the index reference screen without viewing all selected documents.		
5.34	System must support the display of multiple Grantor/Grantee names in alphabetical order.		

5.35	System must support the following movements through an image display: page-by-page, forward and backward, selecting a specific page for viewing, jump to first or last page. Document by document, forward and backward.		
5.36	System must support the retrieval of a document by multiple users at the same time.		
5.37	System must support the ability to ensure that "secured" documents cannot be accessed by the public, or by any member of internal staff, without the proper system security rights. (e.g. Military Discharge records)		
5.38	System must support full-size display of 8.5" x 11" documents.		
5.39	System must support scaled full image display of 8.5" x 14" or larger documents.		
5.40	System should provide minimum display resolution of 200 dpi or better.		
5.41	System must provide the following image manipulation functions: zooming in and out, panning back and forth, scrolling, rotating, flipping and rubber banding.		
5.42	System must meet the following index retrieval performance requirement: results of a simple index query must return from a search within 10 seconds.		
5.43	Vendors should indicate image display performance in "Comments"		
5.44	The system must provide for POS with the print request tied to the cash register in the back. EX When a print is requested, the amount that shows for the customer must be reflected when the cashier pulls up the request to print it.		
5.45	The system must allow for different fees for different print request. Large plats \$2.00 etc. certified copies \$2.00 for certification and .50 per copy.		
5.46	The default search must be as follows: 1. The index should be displayed immediately after request without an intermediate screen. 2. It must be sorted for a single year or for multiple years as follows, from left to right • party name (grantor or grantee)		



- party name (grantor or grantee)
 - document type
 - number of pages
- ****THEN SORT THE DATA AS FOLLOWS IN NUMBERS 1 THROUGH 6
- 1st cross reference for the book and page numbers of related documents
- 2nd district number (including alpha numeric or numeric alpha)
- 3rd section number (if applicable)
- 4th land lot number (including alpha numeric or numeric alpha)
- 5th block number or letter (including alpha numeric or numeric alpha)
- 6th lot number or letter (including alpha numeric or numeric alpha)
- miscellaneous street names, subdivision names
- file/record date/time
- book/page #

The default search will not be sorted in exact date and time. It will be sorted as follows.

The data must be sorted as follows:

First sort will begin with the cross reference field. The book and page number must be sorted in numeric order.

Second sort will be in numeric order by district number. The district numbers in Fulton County are:

1, 2, 6, & 7

8 aka 8C if the user enters either 8 or 8C, the system will search all variations in one request

9 aka 9F or 9 F or 9C, or 9 C, the system will search all variations in one request

13

14

14F or 14 F or 14FF or 14 FF or 14 F F the system will search all variations in one request

17

18



Third sort will be by section numbers - for the 1st and 2nd land districts only

Fourth sort will be in order by land lot number, to include alpha/numeric or numeric/alpha as indexed

Fifth sort will be by block number or letter, to include alpha/numeric or numeric/alpha as indexed

Sixth sort will be by lot number or letter, to include alpha/numeric or numeric/alpha as indexed

Seventh sort in the miscellaneous field, to be sorted last in alphabetical order if there are no other fields indexed.

5.47 When a search is requested, the index will be displayed as described above (5.46) with any intermediate steps.

party name (grantor or grantee)

party name (grantor or grantee)

document type

number of pages

cross reference for the book and page numbers of related documents

district number (including alpha numeric or numeric alpha)

section number (if applicable)

land lot number (including alpha numeric or numeric alpha)

block number or letter (including alpha numeric or numeric alpha)

lot number or letter (including alpha numeric or numeric alpha)

miscellaneous street names, subdivision names,

file/record date/time

book/page #



Hot keys must be available for document data details, to pull up an image, to go to next page or previous page, next document or previous document, or to request a copy of an image or to request a copy of an entire document, also a hot key to return to the search screen.

After retrieving an image, the image must take up most of the page and be at 85% of the original size. The only other information needed on the display along with the image is:

Zoom menu and options to view - the transfer tax form, the previous page, the next page, the previous document, the next document, print current image, print document, print transfer tax form, print index page, and option to exit or return to the index page.

User must be able to sort in exact filing date and time as an option only, not as the default search.

When searching property tax fifas and related, cancellations, assignments etc, that are filed using the bulk process, these documents must have newly created document types with parcel ID number extracted when the documents are sent to us. There must be a way to display the parcel ID number in the miscellaneous field, so they can be researched. The parcel ID number must be sorted in numerical order so they can be easily researched. They should also be a method to enter a parcel ID number and search the records for these newly created document types.

No.	Requirement Description	Response E/M/P/O/C/X	Comments
6	Printing		
6.1	System must provide print functions that include: <ul style="list-style-type: none"> • Printing of entire document and all of its pages • Printing of retrieved index list • Printing of selected document pages • Screen print of current screen • Print full size plat copies on the floor at public Printers, “rubber band” a lot and print the rubber banded area, ability to print various size plats on the floor, print a document or part of a plat and print only the selected part of an image. Printing can be directed to the printers on the floor or to the back for printing by the employees. 		
6.2	Must be capable of generating a paper index.		
6.3	Frequent customers to have draw down/prepaid debit accounts. System must be capable of using a debit card system for prepaid accounts and/or account numbers. Prints are not to be released until payment is finalized.		
6.4	When viewing each images customer can mark the image/page for printing, without having to enter the page number.		
6.5	Ability to request certified copies for printing. System will print the text necessary for a certified copy, Clerk will only need to sign the document and place the Court seal.		
6.6	System must provide the ability to print all the imaged pages of a document without looking at each document page.		
6.7	System must provide the ability to queue prints to specific printers and the ability to specify default printers.		
6.8	System should meet the following print performance requirement: printer should print the image at the rated speed of the printer.		



6.9	The system should allow for print requests to be stored in a queue for a specified period of time. (i.e. shopping cart basket)		
6.10	The print services subsystem must be capable of supporting current industry standard printers such as Hewlett Packard and Lexmark laser printers.		
6.11	Printers must be individually addressable by the users as defined by the system administrator. Not all printers within the printing subsystem are to be available to all users unless allowed by the system administrator.		
6.12	System should provide the ability to print 8.5" x 11" and 8.5" x 14" and 11" x 17" copies. All prints sizes should be available on the floor to customers using the POS system.		
6.13	The system should provide "quick reference" cards attached or near each public workstation. With the exception of initial system training, operators of the public workstations should not require to interface with the Recorder staff.		
6.14	The system must ensure that the public workstations have access to a local high speed printer. (Operators of the public workstation should not be required to interface with the Recorder staff to retrieve printed documents that are available through the system as digital images).		
6.15	The system should be able to print to a wide format printer for all full size plats and floor plans documents.		
6.16	Printing of plat and condo floor plan documents should function in a consistent manner with other documents.		
6.17	The system must print out a receipt with each printed document or group of printed documents at the customer request. Customer can request a receipt for the entire day or whenever requested.		
6.18	The information printed on this receipt must be capable of being corrected by the system administrator.		

No.	Requirement Description	Response E/M/P/O/C/X	Comments
7	Data Archiving		
7.1	The system must have the ability to download images to CDROM in addition to transferring to a network drive for film creation purposes. This must include archiving of plats and floor plans on 35 mm film using an on site Archive writer.		
7.2	Must be capable of creating microfilm for e filings without scanning paper copies of the documents.		
7.3	16 mm film to be created on site using an archive writer.		
7.4	35 mm film to be created on site for plats and floor plans		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
8	Internet		
8.1	The system must maintain all current internet capabilities and integrate with the a plan scanning system through 2004 – See Appendices		
8.2	The system should provide for new revenue generating services via the Internet including image viewing.		
8.3	The system should provide for the printing of Internet images for a fee.		
8.4	The system shall provide the ability of processing payments online including credit cards, and draw-down accounts via secure username and password authentication.		
8.5	The system must ensure that data available via the Internet is secure and separate from the rest of the internal system. Specifically, system architecture and final configuration must provide protection of data from Internet access.		
8.6	Vendor should clearly identify current capabilities and future directions to support e-Recording.		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
9	Desktop Stations		
9.1	Desktop stations should be Microsoft Windows XP Professional or higher workstations with adequate system resources required for the efficient processing of all system application components running on the desktop.		
9.2	The system workstations should be developed using imaging standards to ensure that all workstations of a particular function are configured identically and be supported in an efficient manner.		
9.3	The system workstations monitors must be large and capable of displaying all resolutions required by the system. Vendors may propose space saving designs as appropriate.		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
10	E-Filing		
10.1	The system shall provide means to record documents electronically. This functionality will be deployed in phases as the standards and level of acceptance in the recording industry increase. Initially, this may be implemented for, but not limited to, a single transaction type – e.g. a satisfaction from an out of state lending institution. Vendors that do not have this capability may identify 3rd party partners as defined previously in this document.		
10.2	Accept e filings from County approved submitters (trusted parties) following PRIA guidelines.		
10.3	Accept e filings from all approved submitters using PRIA compliant software.		
10.4	E filing system should have the same capabilities as paper filings, customer tables, rejection letters, etc.		
10.5	System must be able to give the filing date and time based on the actual date/time the document is accepted by the Clerk.		
10.6	System must alert the cashier/recorder of e filings in the queue. Must alert with the submitters identification and the number of filings in the queue. E filings to be sent to designated employees.		
10.7	System must be capable of electronic filing in tier 1, tier 2, & tier 3 as defined by the Uniform Electronic Transaction Act (UETA) and as defined by the Uniform Real Property Electronic Recording Act (URPERA)		
10.8	Electronic recording payments to be guaranteed by a third party approved by written agreement with the Clerk of Superior Court. EX. Pay Pal or ACH.		
10.9	Images E-filed must be imprinted with the book and pages numbers on the first page of the document or have the option to imprint the book and page number on each page.		



10.10	If the document e filed is only imprinted on the first page, when a copy is requested on public inquiry, all pages will be numbered.		
10.11	Must accommodate customers' use of different e-filing systems compliant with PRIA.		
10.12	System must be able to give the filing date and time based on the actual date/time the document is accepted by the Clerk.		
10.13	Must accommodate filing parties who chose to e-file using the GSCCCA portal.		
10.14	System must have automated indexing (OCR) capability for e filed documents; this must be integrated/linked to the indexing/verification component.		
10.15	System must have the capability to designate certain cashiers/work stations for the acceptance of e filings.		
10.16	E filed documents rejected will have the filing date/time when they are returned in recordable form. If the error is made by the Clerk's Office staff, the filing date given will be the filing/date time it was originally submitted.		
10.17	A supervisor can manually assign a filing date and time and or a book and page number.		
10.18	Clerk can manually assign a filing/date and time (supervision function)		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
11	Back Office - Network		
11.2	The system must be compatible with the County network infrastructure.		
11.2	Vendors must identify all network and telecommunications infrastructure requirements		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
12	Business Continuance		
12.1	System must provide the ability for full backup and recovery in the case of any type of malfunction (hardware and/or software).		
12.2	The system must provide backups for images and index data, and allow the System Administrator to control and adjust backup procedures.		
12.3	System must keep image and index databases on-line indefinitely.		
12.4	Vendor must supply their backup procedures and policies as part of this proposal.		
12.5	Must provide a detailed listing of names, addresses, phone numbers and e mail addresses of key contact personnel		
12.6	Vendor may provide estimate for hot site, warm site and off site data backup options as part of business continuance plan.		
12.7	The system must be architected in such a fashion so as to allow for the recording of documents during a partial outage of the final data repository (database). This may be local cache directory of the recording machine or other. Vendors should specify how periodic interruptions in network connectivity and/or partial power outages will affect system workflow processing.		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
13	Administration/Security/Other		
13.1	System must provide a comprehensive administration and security system including, but not limited to: role based security schema, administrative override of information with a “sealed” status, completed auditing features for all recording, indexing, proofing and verification processes including public workstation by user ID or account.		
13.2	The system must also provide auditing and reporting capabilities on all Internet based functionalities.		
13.3	The system security schema should be desired as a hierarchical system that allows a specific Operator role to view only those allowed functions.		
13.4	The system should have the ability to monitor workflow queues and generate historical reports by date and time range, operator or other criteria.		
13.5	Application source code: Should the vendor/contractor cease to be in business or if any proceeding in bankruptcy, insolvency, or receivership, whether voluntary or involuntary, is initiated by or against the Vendor/Contractor, a copy of the source code will be provided to the Recorder’s office at no charge. During the term of the contract of the selected vendor, a copy of the source should be maintained with a third party escrow agent, who would be responsible for delivering the source code to the Office as provided for above. The source MUST be kept current with each update to the system.		
13.6	The system must have the capacity to process the current volume plus 10% annual growth for 10 years beyond implementation date.		
13.7	The vendor of the system must certify that it has complete and exclusive ownership of all application code for all modules proposed.		

13.8 The system must provide periodic updates and patches to the system and peripheral components as required.



No.	Requirement Description	Response E/M/P/O/C/X	Comments
14	Data Migration & System Integration		
14.1	<p>The system must be able to accept data migrated from the existing system. This data includes, but is not limited to, the following:</p> <ul style="list-style-type: none"> • Indexes as stored in an existing Oracle 10g data base. • All digital images and additional information currently stored in a database. This requirement may not be implemented until this function is under contract. 		
14.2	Must be capable of bulk data extraction which should include tax parcel ID numbers for indexing property tax liens.		
14.3	The system must provide the means of providing required information on a cover sheet to facilitate integration with the County Assessment department. This information as is available in the system from the recording process may be required to be available on a cover sheet or similar means.		
14.4	The system should have the ability to integrate/interface. This process should appear seamless to the public.		
14.5	System must have an unverified search of information from the PT 61 form by parcel identification number and or street address. This info is to be captured from the PT 61 forms that are indexed by the filing parties. This will be an unverified search and a statement at the top of the monitor screen must be printed clearly as a disclaimer. This may be done with an interface/integration with the Department of Revenue?		
14.6	Interface with tax assessor to locate the tax parcel I D from the PT 61 form.		
14.7	Property tax FIFAS to have a unique document type and parcel ID # to be used for data extraction.		

14.8	The ability to retrieve archived data after the vendor performs an upgrade (minor or major). The vendor shall either provide a tool for historical use or convert all of the old data.		
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No.	Requirement Description	Response E/M/P/O/C/X	Comments
15	Back Office - Database		
15.1	The system shall utilize Oracle 11g Enterprise Edition. Other database platforms will be considered as proposed.		
15.2	System must utilize ODBC compliant databases.		
15.3	<p>For every document recorded, depending on the type of document, the system must be able to capture and store, but not be limited to, the following information:</p> <ul style="list-style-type: none"> • Instrument number • Document type (i.e., instrument type) • Date and time recorded (with unique seconds) • Book type • Book number • First page number, number of pages • Consideration amount • Property address & Parcel ID's • Name and return address • Name of submitter and address • County recording fees • Payment type(s) • Party types (this varies by document type) • Party names (all) - separate data elements for surname, given name, middle • Party AKA names (Also Known As) - for name changes, etc. An AKA name is defined to the system as equivalent to the specified party name • Firm Name (if party is a firm) NOTE: It will be important to distinguish between individual names and firm names during data entry • Instrument number or parent document (if a UCC) • Date of last change (for changes after document has been verified) 		
15.4	System must provide user maintained table(s) for defining document fees and taxes by document type.		

15.5	System must have the ability to compute the total amount to be charged to record a specific document type based on the taxes and fees that together make up the total.		
15.6	System must allow the County to define the Recording fees as fixed fees, and/or fee calculations.		
15.7	Recording fees by document type must be definable on a per-page charge, per name charge, or flat fee charge.		
15.8	System must provide the ability to define a base rate for a base number of pages, and then to define additional fee amounts for additional pages beyond the base.		
15.9	User maintained calculations must include, but not be limited to all current document types and fee tables.		
\$15.10	Instruments presented may include parcels outside of the County and or state. If so, tax is only collected for this County's portion for the municipality. The State portion may or may not be collected depending on whether or not this County is the first county of recording. A user override of tax is required if an instrument covers multiple properties in multiple counties and or states.		
15.11	System must provide a user maintained table for setting up customer information, (i.e., a Firm Table). The Firm Table should capture sufficient customer information to support debit, credit, and draw down transactions.		
15.12	System must provide user maintained table(s) for defining and maintaining document and company codes. System must allow codes to be retrieved from the table during data entry, as well as return addresses for mailing back instruments.		
15.13	System must provide user maintained table(s) for commonly used party names. System must allow these names to be selected from the user-defined table(s) during indexing.		



15.14	System must provide the ability to enter and store unlimited grantor/grantee names, mortgagor/mortgagee names, or any other party type names.		
15.15	System should support modification of previously verified data with the appropriate level of security for modifications.		
15.16	System must provide the ability to establish security profiles for users that can be used to restrict access to specific types and groups of documents.		
15.17	System should provide the ability to establish role based security profiles for users that can be used to restrict access to specific types of activities. This would include, but not be limited to: entering new documents, updating documents, indexing documents, verifying documents, viewing document images, faxing documents, viewing secured documents and updating secured documents.		
15.18	System should provide the ability to restrict access to any menu option based on the user's ID. Alternatively, system should provide the ability to create and maintain custom menus for individual users and/or workgroups.		
15.19	System must provide the ability to restrict public access to "confidential" indexed documents.(i.e. Soldiers Discharges)		
15.20	System must provide the ability to copy name information when entering names into the cashiering, indexing, and verification modules.		
15.21	The vendor must clearly identify all system components and hardware specifications required to implement.		
15.22	The system must be capable of receiving simultaneous inputs of scanned data and index data from multiple workstations.		
15.23	The system database should be able to be stored in a variety of storage formats including but not limited to, Storage Area Networks (SAN), Clustered configuration and Replicated (redundant) systems. Vendors should estimate 30% of more required storage as appropriate with the proposed system.		



15.24	POS for public inquiry must be tied to the cashier stations in the record room. Ex. Customer s requests \$5.00 work of copies, the cashier can pull up the print request and see the \$5.00 charge and balance the register with the print request.		
15.25	POS can charge different prices for different print request when printing to the back (cashiers or on the floor.) EX \$2.50 for an index page and \$2.00 for an 11" X 17" plat.		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
16	Tax Assessor		
16.1	Print more than 90 documents at one time		
16.2	A screen to select only what we use to transfer ownership: such as Warranty Deeds, Quit Claim Deeds, Limited Warranty, Special Warranty Deeds, and Deed Corrections etc. and any other document that has a PT61 form.		
16.3	A separate screen to print Plats and Surveys.		
16.4	Search by Name		
16.5	Search by book and page number		
16.6	Search by Instrument Type		
16.7	Search by Land Description		
16.8	Search by Street Name		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
17	Tax Commissioner		
17.1	Receive books/pages for recording and transferring tax liens		
17.2	Receive confirmation that recording and transferring of tax liens was successfully completed		
17.3	Ability to view recorded tax lien documents		
17.4	Report of canceled tax liens		
17.5	Verification of tax payment status of a land parcel		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
18	Environment & Community Development		
18.1	Remote access to static copies of documents of the following nature and locatable by address or Parcel ID Number (PIN): plats, deeds, easements, associated indemnifications, active and historical liens, other encumbrances, etc.		
18.2	Remote access to static copies of documents of the following nature and locatable by PIN or development name: homeowners association charters, development agreements, etc.		
18.3	Remote access to current ownership information of for parcels locatable by property address or PIN		
18.4	Verification of tax payment status of a land parcel		
18.5	Provide Zoning (history) for a given parcel		
18.6	Identify Zoning Case Numbers and all Permit Numbers (Land disturbance and building) for a given parcel		
18.7	Tutorial and help capabilities for the software		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
19	Reports		
19.1	Agency billing report generated by agency/date		
19.2	Each cashier's daily report of receipts collected		
19.3	POS account listing with balances by date		
19.4	Summary report of payments collected by date/cashier		
19.5	Payments report by type		
19.6	Receipt report with breakdown of document types/fees collected/billed		
19.7	Audit trail report of corrections to funds		
19.8	Audit trail report of corrections to recording information		
19.9	Transfer tax distribution by date to municipalities with annual millage rate changes.		
19.10	Intangible tax distribution by date to municipalities with annual millage rate changes.		
19.11	Transfer tax detail by date.		
19.12	Intangible tax detail by date		
19.13	PT 61 details and status		
19.14	Breakdown reports of all payments collected and their disbursements to agencies/funds with annual millage rate changes.		
19.15	Staff statistics reports		
19.16	Cross reference report - When data entry clerk enters a linked / related document system to generate a report with the book and page # of the original document and the book and page # of the new linked document for the purpose of cross referencing on paper.		
19.17	Intangible tax distribution by commissioner district		
19.20	Transfer tax distribution by commissioner district		



No.	Requirement Description	Response E/M/P/O/C/X	Comments
20	Financial Functions		
20.1	Make corrections to each cashier's drawer in the Record Room		
20.2	Prior period adjustments (without effecting the current day's reports)		
20.3	Create custom reports as needed and when laws and/or fees require changes within 30 days of request.		
20.4	Reports modified as needed without additional charges		
20.5	A 24 hour response time to balancing inquiries and discrepancies when report do not generate as they should (i.e. debits/credits don't balance)		
20.6	Financial reports should meet GAAP requirement & standards		
20.7	Incorporate a training simulation area for new hire trainees for the entire application		



ACKNOWLEDGEMENT OF ADDENDUM NO: 1

The undersigned proposer acknowledges receipt of this addendum by returning one (1) copy of this form with the proposal package to the Purchasing Department, Fulton County Public Safety Building, 130 Peachtree Street, Suite 1168, Atlanta, Georgia 30303 by the RFP due date and time **Tuesday, August 4, 2009 @ 11:00 A.M.**

This is to acknowledge receipt of Addendum No. 1, _____ day of _____, 2009.

Legal Name of Bidder

Signature of Authorized Representative

Title