INCORPORATED COUNTY OF LOS ALAMOS

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Procurement Division

December 10, 2024

TO ALL HOLDERS OF SOLICITATION DOCUMENTS FOR:

Request for Proposals No. RFP25-32
RFP Name: Indexing and Redaction Services
Addendum No. 3

This Addendum No. 3 forms a part of the Solicitation Documents and modifies, as noted below, the original Solicitation Documents identified above.

This Addendum provides the following information as well as questions received and County's answers to all potential Offerors/Proposers:

1. **Due to outstanding un-answered questions from potential respondents the County has determined that an extension of the submission deadline is warranted, see below for the extension information. Should the County's answers to the remaining questions materially impact the responses from Offerors who have already submitted a response to the RFP, a revised response may be submitted up to the submission deadline described below. No previously submitted RFP responses have been opened by the County, and no responses will be opened until after the revised submission deadline.**

2. **NOTICE TO POTENTIAL OFFERORS/PROPOSERS: THE SUBMISSION DEADLINE HAS BEEN EXTENDED TO DECEMBER 17, 2024, 2:00 PM MOUNTAIN TIME.**

3. Can you please share the sample of redacted document?
   RESPONSE: See below for examples of redacted document, attached as Exhibit F.

4. Do we need to provide the digitized documents in specific folder structure?
   RESPONSE: See below attached as Exhibit G, Tyler Index Data and Image Upload Specification which details the file format and folder structure requirements of the County's Record Management solution.

All other provisions of the Solicitation Documents shall remain unchanged. This Addendum No. 3 is hereby made a part of the Solicitation Documents to the same extent as those provisions contained in the original documents and all itemized listings thereof.

Each Respondent is requested to acknowledge receipt of this Addendum No. 3 with the Proposal Forms.

I hereby acknowledge receipt of this Addendum No.3.

_____

Signed   Print Name   Date

_____

Title   Company

Tyler Index Data and Image Upload Specification

Enterprise Records Management

Tyler Technologies standard image upload requires images to be in the following format:

- TIFF format (tagged image file format) and compliant with the TIFF 6.0 specification
- Group IV Compression
- 300 DPI
- Bitonal
- Images must be oriented correctly (right side) up
- Total file size no larger than 65 Mb

Pipe-Delimited File

Whether uploading/importing index data, images, or both, a pipe file is required to get the data and/or images into Records Management.

File Format

Tyler Technologies standard imports data from a pipe-delimited text file.

- Each document must exist as its own row and must not wrap to a second row.

- The first row must be a header row, detailing what data will be contained within each column. The first character in the row should be a #.

- Each row must contain the exact same number of pipes.

#UNIQUE ID|DOC #|REC DATE|DOC TYPE|GRANTOR|GRANTEE|LOAN AMT|NUM PAGES
DOCCUI-00001|2006022378123|02/23/2006 9:58:59 am|DT|WELLS FARGO|JONES JENNIFER|$159,000.00|9
DOCCUI-00002|2006022378124|02/23/2006 10:03:37 am|WD|SMITH JOHN|DOE MICHAEL||3

In the second example, the LOAN AMT column is empty.

Images must be provided to Tyler via Kiteworks for hosted clients, or a drive directly accessible to the server hosting the Enterprise Records Management install. See more on images below.

Note: Charges apply to upload index data and/or images into Enterprise Records Management or other Tyler Technologies applications.

Required Fields

There are four (five if images are being converted) required fields. Each row must contain:

- Unique Document ID
- Document Number (Instrument Number)
- Document Type
- Recording Date
- Relative Image Path/File Name (if importing images)

The reason for the Unique Document Number is that there are sometimes multiple documents in the system with the same document number. What the unique number is does not matter (for new records), but that it is unique not only within the file but unique among other documents already in the system or in other files to be uploaded. It is generally a good idea to have a prefix with DOCC and something unique to the project.

```
#UNIQUE ID|DOC NUM|REC DATE|DOC TYPE|GRANTOR|GRANTEE|NUM PAGES
DOCCHIST2006-1|2006022378123|02/23/2006 9:58:59 am|SUBT|WELLS FARGO|JONES JENNIFER|9
DOCCHIST2006-2|2006022378123|02/23/2006 10:03:37 am|RECON|SMITH JOHN|DOE MICHAEL|3
```

In this example, both documents have the same document number, so the unique id column is what differentiates the records. If, for example, you are importing documents from two different systems that have the same numbering sequence, you could prefix all document numbers from each system to make them unique.

```
#UNIQUE ID|DOC NUM|REC DATE|DOC TYPE|GRANTOR|GRANTEE|NUM PAGES
DOCCVEN-2006022378123|2006022378123|02/23/2006 9:58:59 am|SUBT|WELLS FARGO|JONES JENNIFER|9
DOCCTYL-2006022378123|2006022378123|02/23/2006 10:03:37 am|RECON|SMITH JOHN|DOE MICHAEL|3
```

In this example, both documents have the same document number because they came from two different recording systems, so all numbers from the second system were prefixed with DOCCTYL- to make them unique.

Special Characters

Several special characters are used in the data import pipe-delimited text files.

Backslash (\)

The backslash (\) is used as an escape character. If there are other special characters in the data that are to remain, they must be escaped by a back slash (\). The image path should use a forward slash (/) rather than a backslash.

Pipe (|)

Pipes (|) are used to separate fields. If there are other pipes in the data that are to remain, they must be escaped by a back slash (\).

Example of two fields:	field1|field2
Example of two fields with an existing pipe:	field\\|1|field2

In the second example, the pipe between the word field and the digit 1 would remain in the data and be converted as field|1.

Comma (,)

Commas (,) are used to separate multiple instances within a field. For example, this is used in the Grantor field to separate multiple Grantors. If there are other commas in the data that are to remain, they must be escaped by a back slash (\).

Example of two Grantors:	Smith John, Smith Mary
Example of two Grantors with existing commas:	Smith\\, John, Smith\\, Mary

In the second example, commas were used when indexing to separate the last name from the first name.

Thorn (þ)

Extended ASCII Character 254 (þ) (or HEXIDECIMAL(FE)) is used to separate sub fields within a field. Typically for Composites like Legal Data and Book Volume Page.

Book/Volume/Page

The Book/Volume/Page composite is generally the standard, but some older sites may still only use the Book/Page Composite which is just two fields instead of three.

#INTERNAL ID|DOC NUM|BOOKVOLUMEPAGE|REC DATE|NUM PAGES
DOCC2018976|2018976|ORþ135þ42|3-June-06 03:42:10 pm|7
DOCC2018977|2018977| |3-June-06 03:42:10 pm|7
DOCC2018978|2018976|þ135þ42|3-June-06 03:42:10 pm|7

In the first example, the document is Book OR Volume 135 Page 42. The Volume, Book and Page numbers are separated by thorns (þ).
In the second example, the document did not have a Book, Volume and Page; the column was therefore empty.
The third example, they only have a book and page fields, so book is put into the Volume Field.

Return Address

Thorn characters (þ) are also used in return addresses.

 |ADDRESS1ÞADDRESS2þCITYþSTATEþZIPÞCOUNTRY|

A mailing address that looked like:
 1928 Broadway St
 Suite 100
 Denver, CO 80202

Would look like this: |1928 Broadway StÞSuite 100ÞDenverÞCOÞ80202|

An address that looked like:
 900 Main Rd
 Frisco, CO 80231

Would look like this: |900 Main RdÞÞFriscoÞCOÞ80231|

If there is not a Return Address, the column would be empty.

Legal Descriptions

Thorn characters (þ) are also used in legal composite fields. Please discuss how the legal descriptions will be handled with the Tyler Technologies Project Manager before the pipe file is created. There are several legal data type options. A decision will need to be made to determine which option is best suited for your county's needs.

The most common legal description composites are listed below. The Tyler Technologies Project Manager may decide to use one or multiple legal composites.

legalPlatted – Some older setups may go to the UNIT field
        LOTþBLOCKþTRACTþSUBDIVISIONþUNITþTOWNþCUSTOM1þCUSTOM2þCUSTOM3

legalPLSS – Some older setups may go to the TRACT field
        RANGEþTOWNSHIPþSECTIONþQUARTERSECTIONþSIXTEENTHSECTIONÞTRACTÞSIXTYFOURTHSECTION þCUSTOM1þCUSTOM2þCUSTOM3

legalSurvey – used mainly in Texas
        ABSTRACTþSURVEYþBLOCKþTOWNSHIPþSECTIONþTRACTþACRES

legalTownship – used mainly in Michigan
        TRACTþSIXTEENTHSECTIONþQUARTERSECTIONþSECTIONþTOWNSHIP

Names

Names are stored in several different ways in different counties.
- Some a single name field, like:
  - Last First Middle Suffix
  - Last, First Middle Suffix
- Some separate name fields
  - First Name
  - Middle Name
  - Last Name
  - Suffix
- Others will use special name composite fields.

Iowa Names Composite

Last NameþFirst NameþMiddle NameþSuffixþHumanþCapacity

Last Name – person's last name
First Name – person's first name
Middle Name – person's middle name
Suffix – person's suffix
Human – Boolean – true person or false for company
Capacity – will be capacity code

North Carolina Names

NameþStatusþSetOutþHumanþSuffixþSurnameþSlipVerify

Name – first name if human, company name if non-human
Status – type of name – such as Collector, Agent, AKA, Assumed, DBA, Trustee etc. Each client has a unique list, the list much match exactly
SetOut – leave blank
Human – Boolean – true person or false for company (required)
Suffix – JR, SR, II, III, IV, V, VI
Surname – last name if human
Skip Verify – set to false (required)

New York Names

Last NameþFirst NameþMiddle NameþSuffixþHumanþCapacityþAliasþBirth DateþParty ID

Last Name – person's last name
First Name – person's first name
Middle Name – person's middle name
Suffix – person's suffix
Human – Boolean – true person or false for company
Capacity – will be capacity code
Alias – also known as
Birth Date – MM/dd/yyyy
Party ID – unique ID identifying that person

Related Data

The Related Data composite to import related data.

Document IDþDocument NumberþBookþVolumeþPageþRecording DateþDocument
TypeþNotes

Document ID – This will be the unique ID of the document to which this one is related. If the
document it's related to is not in the system or the unique ID is not known this field should
be left blank. Though if a proper unique ID is not used there will be no direct relation
between the two documents.
Document Number – Related Document Number
Book – Related Book Type
Volume – Related Volume, if only a related book/page put the book into this field
Page – Related Page
Recording Date – Recording Date of related document (if known)
Document Type – Related Document's document type (if known)
Notes – additional notes about related document

Date Formats

All date fields must be formatted into a recognizable date format. Acceptable formats are
listed below. The am and pm are case sensitive and must all be lowercase. MM indicates
that digits are used for the month (i.e. 12 is used for December). MMM indicates that the
month's abbreviation is spelled out in all upper-case letters (i.e. JAN, FEB, etc.).

NOTE: It is preferred to use one of the first four date formats, otherwise the performance
will be affected as it will take longer to find the correct date format to be able to convert
the string to a valid date.

MM/dd/yyyy hh:mm:ss am (or pm)
MM/dd/yyyy hh:mm:ss
MM/dd/yyyy hh:mm am (or pm)
MM/dd/yyyy
yyyy/MM/dd
MMM dd, yyyy hh:mm:ss am (or pm)
MM/dd/yy dd-MMM-yy
dd-MMM-yy hh:mm:ss am (or pm)

Image Document Code

If the image is to be a different document code from the data, you can use the image document code column in the pipe file to specify the image's document code. For example, if the index data is Public but the image should be confidential, the document code column would contain a Confidential document code.

This can also be used with documents with multiple attachments. For example, the first attachment may be the document image and should be available to the public, but the second attachment may be a Declaration of Value and should be confidential. In this case, the document code column would contain two values, separated by a comma – the first value being the document code for the first attachment and the second value being the document code for the second attachment. The document codes are confidential and should be used as shown in the example below. If you are converting multiple attachments with different Image Document Codes, the first attachment needs to be one of the Public ones, the rest can be in any order.

1245281|Public,Confidential|2006/JUN/30/04440555.*,PCOR/2006/JUN/30/04440555.*
1245282|Public,Confidential,Public|2006/JUN/30/0556.*,PCOR/2006/JUN/30/0556.* ,TD1000/2006/JUN/30/0556.*

Multi Page TIFF Images

Multi page TIFF images can also be used. All pages of the TIFF will be converted as the document's image. Multi page TIFF images should have a .tif extension.

Documents with Multiple Attachments

Commas are used to separate multiple attachments for the same document. In the following pipe file example, document 1245281 has two attachments. The images are stored in two different locations.

1245281|2006/JUN/30/04440555.*,PCOR/2006/JUN/30/04440555.*