

LASERFICHE

DOCUMENT MANAGEMENT SYSTEM PROPOSAL

Prepared for

City of Everman

Company Overview

Since 1995, TDS has provided document management, Automated Forms, custom software solutions and scanning services to government, education, business, financial and healthcare organizations throughout Texas, New Mexico and the U.S.

We have encountered and solved a wide variety of document management challenges. Our solutions are customer focused and specifically designed to meet the varying needs of a diverse client base.

As a full-service document and records management provider PDS develops and supports solutions in four areas:

1. Document Management Software Systems
2. Canon Scanners and capture systems
3. Electronic / Automated Forms
4. Custom Software Applications integrated with document management
5. Document / Data Conversion including Paper to digital format

We believe this strategy will best serve our clients over the long term as we are positioned to recommend the most cost effective solution based on the customers document/record characteristics (i.e. volume, retention, retrieval rates etc.).

As members of the Association of Information and Image Management (AIIM) and the Association of Records managers and Administrators (ARMA) PDS actively participates in the organizations informational marketing program and is therefore abreast with changes, modifications and new technologies within this fast paced environment.



PDS has also been awarded the prestigious Laserfiche Value Added Reseller designation of being "Gold Certified". PDS has accomplished this through its successful mastering of more than 14 classes that are part of the Laserfiche Certified Professional Program. This certification reflects our commitment to our clients to ensure our entire team is highly knowledgeable regarding the Laserfiche Enterprise Content Management Solution.

Components of the Solution - Software Configuration

LASERFICHE CLOUD

Laserfiche Cloud is enterprise content management with built-in business process management tools in a secure and scalable Software-as-a-Service (SaaS) subscription. It enables organizations to securely manage and share documents, videos, photos and other content as they flow through organizational processes.

The following modules are included with the Laserfiche Cloud solution (Note separate costs to deploy)

CONTENT CAPTURE

There are many options to capture content in Laserfiche Cloud:

- Laserfiche Scanning allows you to easily convert paper documents into convenient electronic records in Laserfiche.
- Laserfiche Snapshot allows you to quickly print an archival image version of any file type to Laserfiche.
- The Laserfiche Cloud website allows you to import files directly from your computer using drag-and-drop.
- Laserfiche Import Agent automatically uploads content from local storage as soon as it is detected.

BUSINESS PROCESSES

The routing of a business process is diagrammed through a process modeler, which is based on the Business Process Model and Notation (BPMN 2.0) standard. Different web forms can be associated with each step of the business process, allowing form creators to tailor the presentation of information for the specific step and/or users.

FORMS

Forms in Laserfiche Cloud allow process managers to create and publish web forms with an intuitive forms management system that requires no coding or scripting. Attractive forms can be easily created with preconfigured templates or customized with editable fonts, colors, uploaded images and layout options. A wide variety of form elements, including fields, checkboxes and radio buttons, can be dragged onto a form to collect the exact information you need, in the precise format you require.

LASERFICHE APP

The Laserfiche mobile app (Android, iOS, or Windows) enables you to capture, upload, and securely access documents, complete tasks and submit electronic forms inside Laserfiche while on the go.

You can browse for documents in a folder structure; search all your content; create, copy, move, rename, download, print, and delete documents; modify document fields; and view annotations; additionally, you can add documents to your Laserfiche repository from other apps, the mobile device's gallery, or

AUDIT TRAIL

Auditing enables you to track activities performed in a Laserfiche repository. The tracked information is efficiently stored in log files that are processed for use in reports. Combined with other aspects of the Laserfiche system, auditing not only helps to show compliance with legal regulations, but also contributes to the security of the Laserfiche repository.

CONNECTOR

Laserfiche Connector provides a streamlined experience for integrating Laserfiche with line of business applications such as Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) systems. A Laserfiche Connector profile can be configured to run a search, assign templates and fields to search results, scan a document, import a document, open a website, start another application, or write information to an application.

INTEGRATIONS

Laserfiche Cloud also has built-in integrations to connect you with core applications:

- The Office Plug-in allows you to quickly save Microsoft Office® documents to Laserfiche, and work with them from within Laserfiche. You can also use the Office Plug-in to quickly archive emails from Microsoft Outlook® and capture information about the emails.
- Import files saved in Microsoft Office®, Google Drive®, OneDrive® and OneDrive for Business® directly into Laserfiche.
- DocuSign® allows you to request signatures on your document (DocuSign account is needed). L
- Laser App® provides forms filling solutions for broker-dealers, financial advisors, insurance agents, and others in the financial industry (Laser App account is needed).

PDS Comprehensive Implementation

The following section serves to provide the City with an overview of the basic components of successful imaging implementation services from PDS. Technology in general and your Content Management System represent one of the most significant investments you make in your organizations success. It is important to work with a City that understands your business processes. Together Professional Document Systems and Laserfiche are committed to providing a comprehensive framework for delivering value quickly and efficiently. The PDS team of seasoned professionals is here to guide you through the planning and implementation process.

The “Scope of Services” outline provides basic process and procedures for the installation of the imaging system. Actual services may vary depending on the final negotiated scope of the project.

Scope of Service – Configuration and Initial System Design

1. Advise on and review current computing infrastructure to ensure document management compatibility and growth capabilities.
2. Review and plan Laserfiche software environments to ensure optimal server performance, prompt data retrieval and adequate data storage and archiving.
3. In conjunction with City user group, review document retrieval characteristics and assist in database metadata / index field configuration and template design.
4. Assist with creation of a nested folder structure designed to maximize the efficient use of the content management system.
5. Review standard / best practice file naming conventions and plan the automatic naming and folder placement through a customized workflow process.

Scope of Service – Design and Setup of Indexing Template Structure

1. Create LF folder structure based on the agreed upon workflow environment.
2. Create proper Index fields to accommodate template creation
3. Create templates to be utilized in the workflow process.
4. Configure template security to provide proper template access to users within the workflow process.
5. In conjunction with the system administration City, assign group and individual user identifications.
6. Test all parameters of the Server and DB.

Scope of Service – Work Flow Implementation – File Auto-naming and Folder Placement

1. In conjunction with the user group, review folder structure, templates and manual file naming convention.
2. Recommend best practice for automating the folder placement and file naming process.
3. Design final folder placement and naming convention.
4. Configure LF Workflow module based on the “map” created above.
5. Create appropriate Email correspondence for approval and routing (if required).
6. Install and test the WF process.

Scope of Service - Installation and Configuration – Records Manager

1. Install Laserfiche Records manager for LF on Cloud server.
2. Configure License Server for appropriate Records Manager Licensing.
3. In conjunction with the City Clerk and administration group, design records management parameters and record series designations for all applicable record type within the Cities system.
4. Design and configure Laserfiche workflow parameters to create the links between Laserfiche end user folders and the Records Manager record series folder.
5. Test all parameters of the LF / Records Manager system.

Scope of Service – Optional Professional Services for Future Phases

Configuration and Implementation of the following modules

- 1) Forms
- 2) Audit Trail
- 3) Connector
- 4) Advanced BPM (workflow configuration)

Training

Departmental Scan / View Operators – Eight (8) 3-4 Hour Sessions (On Site)

The PDS user Scan operator training program is tailored to multiple sessions of 5 -10 individuals per session. Within the course of the 8 hours, users will be trained in all basic functions of the LF system with specific emphasis in the following areas:

- Creating new documents or records.
- Scanning new documents or records.
- Snapshotting documents.
- Template configuration
- Adding pages to existing records.
- Scanner set up options and configuration.
- Batch Scanning
- Batch Indexing
- Document searches.
- Reading the search “hit list”.
- Viewing scanned documents.
- Creating document annotations.
- E- Mail and options for sending documents or pages.



City of Everman Document Management Proposal

Price Proposal

Region 19: 20-7383
Texas Buy Board: 625-20
GSA: GS-35F-118V

LASERFICHE CLOUD SYSTEM WITH 10 NAMED USERS, 10 PARTICIPANT USERS (SEARCH & VIEW)					
Part Number	Description	Qty	Cost Per Unit	GSA Per Unit	Total Cost
SOFTWARE					
PDS-CLENF2 5-49	Laserfiche Cloud - Professional User	10	\$830.00	\$752.64	\$7,526.44
PDS-CFPAR 10-199	Laserfiche Cloud Named Participant User Provides read-only repository access and the ability to participate in forms processes.	10	\$120.00	\$108.82	\$1,088.16
PDS-CLRM	Laserfiche Cloud Records Manager	1	\$5,750.00	\$5,214.10	\$5,214.10
PDS-CCSX1	Laserfiche Cloud ScanConnect	10	\$100.00	\$90.68	\$906.80
PDS-CSTOR	Laserfiche Cloud Storage (100GB / User - Inclusive)	1000	\$0.00	\$0.00	\$0.00
	TOTAL SOFTWARE				\$14,735.50
HARDWARE					
Open Market	Server provided by PDS / Laserfiche Cloud	1		\$0.00	\$0.00
OPEN MARKET	Scanner Provided by City	1		\$0.00	\$0.00
	TOTAL HARDWARE				\$0.00
IMPLEMENTATION & TRAINING					
PDS-LF-DESIGN	LF Folder and Database Design - 10 Departments	2	\$1,280.00	\$1,160.64	\$2,321.28
PDS-LF-SVINSTALL	Laserfiche Cloud Configuration	1	\$960.00	\$870.48	\$870.48
PDS-LF-SCANS	Laserfiche Client Installation	10	\$160.00	\$145.08	\$1,450.80
PDS-LF-SVINSTALL	Laserfiche Cloud Workflow Configuration	1	\$960.00	\$870.48	\$870.48
PDS-LF-SVINSTALL	Laserfiche Cloud Records Manager Configuration	1	\$960.00	\$870.48	\$870.48
PDS-LF-PS	PDS Laserfiche Professional Services - Records Manager Design and Implementation for 50 Record Types	24	\$160.00	\$145.08	\$3,481.92
PDS-LF-LFBPMPROCESS	Auto Naming Work Flow Process Programming for City Secretary, Finance, HR and 7 other Departments	18	\$160.00	\$145.08	\$2,611.44
PDS-EIM-TRAINING	Laserfiche Training as outlined (4 total days)	4	\$1,340.00	\$1,213.41	\$4,853.64
OPEN MARKET	Travel and Per Diem	2	\$1,100.00	\$850.00	\$1,700.00
	TOTAL IMPLEMENTATION				\$19,030.52
	TOTAL TURN KEY SYSTEM COST - YEAR ONE				\$33,766.02
	TOTAL TURN KEY SYSTEM COST - YEAR TWO				\$14,735.50

OPTIONAL PORTAL FOR PUBLIC SEARCH AND VIEW (1,000 VIEWS PER MONTH)

Part Number	Description	Qty	Cost Per Unit	GSA Per Unit	Total Cost
PDS- CLPPAL	Laserfiche Public Portal - 1000 Views per Month	1	\$600.00	\$544.08	\$544.08
	TOTAL Annual Cost				\$544.08

OPTIONAL FORMS PORTAL FOR PUBLIC SUBMISSION OF FORMS (1,000 SUBMISSIONS PER MONTH)

Part Number	Description	Qty	Cost Per Unit	GSA Per Unit	Total Cost
PDS- CLFPAL	Laserfiche Public Forms Portal - 1000 Submissions per	1	\$1,800.00	\$1,632.24	\$1,632.24
	TOTAL Annual Cost				\$1,632.24



City of Everman Document Management Proposal

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their duly authorized officers effective as of the date first set forth below.

Terralogic Document Systems

CITY OF EVERMAN

Matt Bowman

(Signature)

(Signature)

Matt Bowman

(Typed or Printed Name)

(Typed or Printed Name)

President

(Title)

(Title)

Date: **9-16-22** _____

Date: _____

Dealer Address and Support Number:

Terralogic Document Systems
Professional Document Systems

El Paso, Texas
Midland, Texas
Albuquerque, NM
Colorado Springs, CO

800-644-7112 General Inquiries
800-708-8584 Technical Services