

City of Apache Junction

Pinal County

Enterprise Content Management System – Self-hosted Subscription

June 18, 2024
Valid for 60 days



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LASERFICHE SELF-HOSTED SUBSCRIPTION LICENSE OVERVIEW

The Laserfiche Self-Hosted Subscription site license introduces a straightforward software license that includes a wide variety of features to benefit all departments of the municipality. As you become more familiar, we can add automation, integrations with 3rd party applications and more.

*Laserfiche Self-Hosted Subscription Features:

Features	Self Hosted Business	Self Hosted Add-Ons	Business
Document Management	✓	SDK	✓
Import Agent with Email Archiving	✓	Quick Fields Complete with Agent	10+
Audit Trail	Advanced with Watermarks	Repositories Per Server	15
Full SQL Capabilities	✓	WebLink Public Portal	Unlimited +
Workflow	✓	Forms Portal	3
Forms	✓	Participant Users	+
Connector	✓	Community Users	+
Records Management	✓	Sandbox	3
Enterprise Identity Management	✓	ScanConnect	+
Integrations	Business		
Microsoft 365 Integration	✓		
Integration with SharePoint (hosted)	✓		
Federated Search	✓		
Integration with DocuSign	✓		
Integration with LaserApp	+		

-Not Available + Optional Add-On ✓Included

****Does not come with Microsoft SQL – all database and Microsoft server software needs to be provided by the client.***

Access to Online Support Resources

The Laserfiche Support Site contains detailed technical information to increase your product knowledgebase. The Laserfiche Help Files contain useful information to help you get started with your Laserfiche System. Laserfiche also has numerous help videos which walk you through the product to help you become more familiar and comfortable with all of the different features. Additionally, Laserfiche Answers is an online forum that allows Laserfiche subscribers to collaborate on ideas and solutions.

Pricing/Services:

Line Item Description	Model #	Quantity	Unit Price	Total
Self-Hosted				
#Laserfiche Self-hosted Subscription Business Users - 25-49 Tier	JSENF3	25	\$804.27	\$20,106.75
#Laserfiche Participant Users - 10-199 Tier	JSPAR	75	\$106.59	\$7,994.25
Self-Hosted Subtotal				\$28,101.00
Professional Services				
Laserfiche Installation and Training On-Site Days		4	\$2,200.00	\$8,800.00
Laserfiche Implementation/Training-Remote per hour		16 hrs.	\$175.00	\$2,800.00
*Custom Development Work		16 hrs.	\$210.00	\$3,360.00
**Laserfiche Forms and Workflow Development - remote		60 hrs.	\$195.00	\$11,700.00
***Records Retention Essentials (Yr. 2 forward: \$300.00)		1	\$1,995.00	\$1,995.00
Professional Services Subtotal				\$28,655.00
Grand Total				\$56,756.00

#Laserfiche SAAS Software priced at OMNIA/National Cooperative Purchasing Alliance (NCPA) levels: Contract #01-158

***Custom Development work to be determined.**

****Note that this is in the process of being scoped.**

*****See Appendix C for additional information.**

Anticipated annual SAAS fees after the included 1st year for the above configuration would be \$28,101.00

Note: This estimate is subject to change based upon the then-current support prices for that year. Plan for a 5% YOY cost increase to all Laserfiche SAAS models.

Adjustments to Performance Schedule; Delays:

Adjustments to Schedule: Upon the mutual consent of the Municipality and ICC Community Development Solutions, the "Performance Schedule" may be changed or extended as provided under "Delays" below.

Delays: Client must notify ICC Community Development Solutions, in writing, immediately upon learning or otherwise becoming aware, of any difficulties that may delay the delivery of services or deliverables within each step of the Implementation timeline. Such notification must identify the reason for the delay, as well as the anticipated period of delay. Any delay on the part of the customer that extends 10 city working days (not including Fridays) beyond the target date for completion of any step will result in a project restart and additional charges will be identified as part of a change order provided to the customer. This clause shall not apply in case of force majeure.

GO-LIVE DEADLINE DETAILS AND AGREEMENT

Deliverables: The deliverables for the Project shall include, but are not limited to:

- System Installation, Configuration and Testing
 - Laserfiche Server, Directory Server, Web Client, Workflow, Forms and Audit Trail
 - Other components may be installed based on need or after the initial installation.
- User Training
- User Acceptance Testing (UAT)
- Go-Live Support

Milestones and Timeline:

- Kickoff Meeting
 - On or before August 15th, 2024
- Planning and Installation Phase
 - On or before September 2nd, 2024
- Configuration and Admin Training Phase
 - On or before February 6th, 2025
- User Training, Testing and Acceptance Phase
 - On or before February 6th, 2025
- Go-Live and Post-Implementation Support Phase
 - On or before June 1st, 2025

Responsibilities of Vendor

- Vendor shall assign qualified personnel to perform the services required under this Agreement.
- Vendor shall schedule meetings and project work as quickly as possible to meet the Milestones and Timeline agreement.
- Vendor commits to complete the Project in accordance with the timeline set forth in the Milestones and Timeline section.
- Vendor shall offer weekly meetings to Client, reporting on the status of the Project and discussing any issues that may impact the timeline.

Responsibilities of Client

- Client shall provide Vendor with remote and monitored access to all necessary information, servers, and personnel required for the implementation of the Project. These requirements will be described by name in the kickoff meeting.
- Client shall provide server(s) provisioned as described during the Kickoff Meeting within 1 week of the kickoff meeting.
- Client shall designate a Project Manager during the Kickoff Meeting. This Project Manager will ensure that:
 - Client-side personnel are present at scheduled meetings.
 - Client-side personnel complete tasks assigned during the project.
 - Appropriate personnel are consulted during planning to ensure processes are documented/developed correctly.

AUTHORIZATION & AGREEMENT

The **City of Apache Junction, Pinal County, Arizona** hereby agrees to the procedures outlined above, to ICC Community Development Solutions Terms & Conditions and to the License Agreements for the software referred to above, all of which are available at <https://icc-cds.com/terms-conditions>, and are incorporated herein by reference, and authorizes ICC-CDS to proceed with the project.

Electronic Document Management Project **\$56,756.00**

Estimated Annual support fee second year forward (SAAS): \$28,101.00

Note: Prices subject to change. Plan for a 5% YOY cost increase to all Laserfiche SAAS models.

If/when the client wishes to implement the additional modules included with their licenses, there may be additional development, configuration and training time required. These additional service fees would not apply until you are ready and agree to implement additional components.

SOFTWARE ORDER, PAYMENT AND PERFORMANCE SCHEDULE

Kickoff Meeting

- \$28,101.00 of the project price shall be invoiced upon customer site activation, immediately following the Kickoff Meeting, on or before August 15th, 2024. This covers the software licensing for a single year and is a non-refundable amount, per Laserfiche. Subscription software may be cancelled after this initial year.

Planning and Installation Phase

- \$2,000.00 of the Configuration and Training services shall be invoiced as completed, on or before September 2nd, 2024.
- **Other Services:** These services have not been fully scoped and could be completed within any phase on the timeline depending on the needs of the customer. Scoping will take place during planning and a timeline will be created. ICC-CDS will invoice only the hours used during each phase.
 - \$3,360.00 of the Custom Development services shall be invoiced as completed.
 - \$11,700.00 of the Forms and Workflow Development services shall be invoiced as completed.

Configuration and Admin Training Phase

- \$6,600.00 of the Configuration and Training services shall be invoiced as completed, on or before February 6th, 2025.
- \$1,995.00 of the Records Retention Essentials services shall be invoiced as completed, on or before February 6th, 2025.

User Training, Testing and Acceptance Phase

- \$3,000 of the Configuration and Training services shall be invoiced as completed, on or before February 6th, 2025.

Go-Live and Post-Implementation Support Phase on or before June 1st, 2025

- Covered under maintenance.

In accordance with the terms set forth herein, the System/Product is obligated to perform to the utmost satisfaction of the Client at each specified milestone (milestones and objectives met as defined in this document and the documentation created in the planning phase). Prior to project advancement and the generation of associated invoices (payment terms of Net30), the Client is required to grant explicit approval for each milestone. Prompt adherence to these milestones is considered paramount, and any deviation therefrom shall constitute a breach of this agreement, affording the Client the discretion to terminate the contract without incurring any further financial liabilities. In such circumstances, the Vendor shall retain any payments made up to the approved milestone stages for completed and functional work and furnish an account statement releasing any funds pertaining to unmet milestones.

LASERFICHE PUBLIC PORTAL/WEBLINK PRODUCT

The City accepts all responsibility for reviewing documents to ensure confidential and secure information is protected when made available to outside entities using the Laserfiche Public Portal/Weblink product.

(Client please fill out) Invoice for this Project to be sent to:

Department: _____ **Contact Name:** _____

CITY OF APACHE JUNCTION, PINAL COUNTY, ARIZONA

By: _____ **In the Presence of:** _____

Title: _____ **Title:** _____

Date: _____ **Date:** _____

ICC-CDS, LLC

By: _____ **In the Presence of:** _____

Title: _____ **Title:** _____

Date: _____ **Date:** _____

To authorize the project:

- 1. Sign the Proposal and return to your Solutions Account Executive***
- 2. Fax or email the Authorization & Agreement Section only to: ICCCDS@icc-cds.com • fax (585) 328-8189***
- 3. Mail the signed Proposal to ICC-CDS at: 781 Elmgrove Road • Rochester, NY 14624***

APPENDIX A – INSTALLATION, TRAINING AND SUPPORT

Pre-Installation Teleconference and Technical Review

If applicable, prior to the installation and training, one of ICC-CDS's technicians will work with your technical staff or consultant to review the hardware and other technical requirements and ensure that all hardware is ready for the installation. We will also work with your designated contact person to establish the agenda for the on-site days.

Customized Training

If you are receiving training, ICC-CDS provides practical training sessions to ensure that your users keep pace with "best practices" and that your Laserfiche system continues to provide your organization with the maximum efficiencies possible. Whether you are a new Laserfiche user or an existing user seeking refresher training, we pride ourselves on maintaining a team of trainers who can relate to users at any level of expertise.

Our standard Laserfiche user training covers the basic functions of the program and provides you with the necessary skills to put the system into immediate use. Based on the file organization and file naming structures that were determined by your organization, the training covers input, search and manipulation features using your documents to address file-organization and file-naming structures

Administrator Training covers the system administrative functions and typically takes place throughout the on-site sessions, as appropriate.

TECHNICAL SUPPORT

Technical Support covers all questions that might arise with your Laserfiche system should a technical issue arise. Technical Support covers the installation of software patches and minor upgrades, as appropriate.

The first line of technical support is via telephone, using our toll-free number (855-436-5500) or via e-mail at lfsupport@icc-cds.com. With Basic Support service, technical support requests not immediately addressed will be acknowledged within 8 business hours, with the majority of response times within 2 hours. ICC-CDS's support technician will discuss the issue with you. If there are more detailed diagnostics needed, the technician will log into your system remotely, using the Internet. In this way, the technician can see what the user is seeing, do diagnostics, and generally remedy the situation remotely during this initial contact. In situations that require additional research or work by the technician, we will let you know what still needs to be done, along with a timeframe for getting back to you. You will also receive a Case number for future reference. By providing remote diagnostics and remediation to our clients, we can provide you with quick resolution of your issues to keep you up and running.

SOFTWARE PATCHES AND UPGRADES:

In addition to receiving technical support, customers with a current SAAS contract will receive **critical program updates within the current version of Laserfiche**. This is extremely important because Laserfiche is continuously improved to be even more powerful and efficient. You will receive routine system updates released by the manufacturer after a period of additional ICC-CDS in-house testing, as

applicable. These patches and software upgrades are available for download at our FTP site. Customers are given the option of applying the patches themselves or having one of our Laserfiche technicians apply the patch remotely.

There is no additional cost for the installation of minor software updates or patches (typically called 'point releases'). Major software updates (typically called 'version releases') may have associated service charges to install, upgrade, or to migrate your Laserfiche software to the new major release level. Related training on new functionality of the upgraded software may also have associated service charges. Any additional charges will be outlined and quoted to you in advance.

LASERFICHE OFF-HOURS SYSTEMS UPGRADES:

At times it is a requirement that Laserfiche systems upgrades are done during off hours or over the weekend to minimize operational interruptions. ICC-CDS is happy to work with our customers to accommodate these requirements. With changes in the law regarding payment of overtime for non-exempt helpdesk staff that are involved in doing work after hours or over the weekend, they must be paid overtime. ICC-CDS is going to begin charging a nominal fee for the off-hours work to cover this new expense. The charge will not exceed \$500.00 for the time involved.

Services covered under SAAS:

- Remote troubleshooting and repair to the best of our ability of any errors generated by Laserfiche
- Remote troubleshooting and repair to the best of our ability any Laserfiche functionality that is not working
- Provide and remotely apply minor patches/point releases on an as needed basis
- Respond to request calls within 8 business hours, if not immediately
- Provide technical support between the hours of 8:00 AM - 5:00 PM EST
- Provide access to all major and minor patches provided by Compulink Laserfiche
- User group meetings
- Access to Laserfiche's knowledgebase
- Access to webinars

Services not covered under SAAS:

- Training - New user or refresher training - either on-site or remote
- Repair of damaged databases
- Establishment of SQL maintenance plan
- Addition of custom features or functionality to the software
- Support or troubleshooting of third party software
- Faults or problems caused by unauthorized access to configuration information or changes to components by the user or a third party.
- Installation, Migration, Upgrading of software related to major software releases
- Problems or faults caused by use of the product outside its normal operating conditions.

- On-site technical support, unless it is specifically included as part of the selected Agreement or funded by the Customer on a per-day basis as part of a signed Change Order.
- On-site consulting or training, unless it is specifically included as part of the selected Agreement or funded by the Customer on a per-day basis as part of a signed Change Order.

Customer's Obligation:

- To maintain appropriate backups of the Laserfiche database and associated files.
- To contact ICC-CDS prior to implementing significant network changes that has the potential to impact the Laserfiche system. Some examples are, operating system changes on either the server or PC, replacement of existing PCs or server(s), and changes in network configurations, such as server name, IP address or workgroup on PCs.
- To have Internet access on the Laserfiche server and all workstations where the Laserfiche client is installed and be willing to allow our Support Technicians remote access to the Customer's Laserfiche system via GoToAssist or other acceptable remote access tool.
- To designate an IT contact and to provide the name, phone number and e-mail address on the registration form.
- To describe technical issues completely in order to provide ICC-CDS's Support Technician sufficient information to be able to diagnose and reproduce the problem, including any identified error codes.

APPENDIX B – RECOMMENDED SERVER/WORKSTATION SPECIFICATIONS

Please click on the below links to view current specifications:

[Laserfiche Self-Hosted & Avante Minimum Recommended Hardware Specs](#)

[Laserfiche Default Ports](#)

[Virtualization Considerations for Laserfiche](#)

APPENDIX C – RECORDS RETENTION ESSENTIALS

Records Retention Essentials by ICC CDS

ICC Community Development Solutions has created a toolset to help you handle the essential components of records retention. Our set of tools will help every department efficiently categorize and prep documents for retention and provide the records manager tools to easily search for and send records to final disposition.

Document Retention:

1. We'll provide a set of metadata fields as seen to the right.
2. For retention, select your **Department**, which narrows your list of **Document Types**. Selecting these two bits of data auto-fills the **Retention Period** and **Entry Date Definition**.
3. Based on that, you choose the **Entry Date** as the starting date for the retention period.
4. The **Disposition Date** is auto calculated by Laserfiche.
5. These fields can be added to any template, or you may choose to use the generic Records Retention Essentials template for all documents under retention.

Ready-to-use Searches:

- Documents ready for disposition in 31 days
- Documents ready for final disposition
- Documents not processed (no entry date)
- Documents with a Legal Hold

Legal Hold:

We will create base legal holds for you or create a security tag you can apply to any document under a legal hold. This will apply a bold watermark across the document stating it's not to be destroyed.

Training will prepare you to use all aspects of the system:

- Basic use of the system
- How to search and manage records
- Creating metadata reports of documents being destroyed
- How to set up new templates to work with the automation

The screenshot shows a web interface for a document titled "Retention Demo Doc". It has tabs for "Details", "Fields", "Preview", and "More". The "Fields" tab is active, showing a form with the following fields:

- Template:** A dropdown menu with "Records Retention Essentials" selected.
- RRE Department:** A dropdown menu with "Building" selected.
- RRE Document Type:** A dropdown menu with "Liability Insurance" selected.
- RRE Retention Period:** A dropdown menu with "72" selected.
- RRE Entry Date Definition:** A dropdown menu with "Expiration or Denial of relevant permit" selected.
- RRE Entry Date:** A date input field with "3/10/2020" and a calendar icon.
- RRE Disposition Date:** A date input field with "3/10/2022" and a calendar icon.