

TOWN OF NEEDHAM

Office of the Town Clerk

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Telephone (781) 455-7500 x216
Fax (781) 449-1246
Email: Teaton@needhamma.gov

November 30, 2020

COMMUNITY PRESERVATION COMMMITTEE FUNDING REQUEST 2020/2021

Dear Members of the Community Preservation Commission:

The Town Clerk's office is requesting funding for a project to help preserve the Town's Marriage Records by improving the way these records are maintained and accessed. The project, more fully defined in the Statements of Work provided by the vendors who will be providing the services under State Contract, includes the scanning, indexing, and processing of more than 16,000 Marriage Records as well as the uploading of them into Laserfiche, a Content Management system used in more than 45 communities in Massachusetts and more than 35,000 around the country.

The goal of the project is to protect the historical significance of the records by minimizing the number of times these records which are in bound volumes are physically handled by the Town's staff. Since these records will be digitized the need to access the paper documents will be dramatically reduced. In addition, the software will enable immediate access to the records—which will help to ensure a higher level of customer care for those who need this information—by reducing the amount of time needed to fulfill this task. The Laserfiche software will enable the Town to enter new Marriage Records directly into the program as well as other Town documents—including Births and Death Records.

If the members of the Community Preservation Commission have questions or feel this is not an appropriate request for funding under the CPC guidelines, please let me know and I will try to seek funding through the annual Town Clerk's budget for FY2022.

Thank you for your consideration.

Sincerely,

Theodora K. Eaton, MMC Town Clerk

CPC USE ONI Application #	Y: FY 22-02
Qualifies:	and the state of t
Does not qualif	ỳ:

INITIAL ELIGIBILITY PROJECT APPLICATION FORM

DUE BY DECEMBER 4, 2020

TOWN OF NEEDHAM COMMUNITY PRESERVATION COMMITTEE

www.needhamma.gov/CPC **Email Applications to:**

Carys Lustig and Kristen Wright:

	of Needham 2	
8.	Critical Dates: (If Applicable)	
7.	Estimated Total Project Cost (If Different):	\$
6.	Amount Requested:	\$ 25,000
	Town of Needham - under control of Town Clerk's Office Town Hall 1471 Highland Avenue	ce
5.	Project Location/Address/Ownership (Control):	
4.	Project Name: Preservation of Town of Needham Ma	arriage Records
	Theodora K. Eaton,	
	teaton@needhamma.gov Contact Name:	✓ Historic Preservation ☐ Recreation
	Town Clerk's Office - Town Hall (781) 455-7500 x 216	☐ Open Space ☐ Community Housing
2.	Applicant's Address, Phone Number and Email:	3. Purpose: (Please select all that apply)
1.	Applicant: Theodora K. Eaton, MMC, Town Clerk	Submission Date: December 4, 2020
	clustig@needhamma.gov & kwrigh	it@needhamma.gov

*	CPC USE ONLY: Application # FY22-02
	Qualifies:
	Does not qualify:

Project Name: Preservation of Town of Needham Marriage Records

9. Project Summary: In 100 words or less provide a brief summary of the project:

The Town Clerk's Office has insured that all marriage certificates are preserved and bound since 1919, and has preserved the documents from 1711 to 1919 through Community Preservation funds.

This request is to scan and index the documents from the 1700's to 1970 (or later depending on the recommendation of the Needham Historical Commission), and upload onto a content management system. Companies under state contract will be contracted for this work, and an estimate has been received from one of the potential firms.

The Town Clerk has a sought a recommendation from Needham Historic Commission Chair to review the historic significance of these documents.

Community Need: In 100 words or less provide a brief statement of the need for and the benefits to the community.

Though the marriage documents are bound and kept in the Town Clerk's vault at Town Hall, there is still danger to the preservation through the physical handling by Town staff, as well as the possibility of fire or flood. This project protects the historically significant documents.

The software will enable immediate access to the records which will help ensure a higher level of customer care for those who need the legal documents, reducing the amount of time needed to fulfill this task. The new software will allow staff to enter marriage records directly into the system.

Note: This application enables the Community Preservation Committee to review the request to assess eligibility. You shall be notified by January 1 of your eligibility. If eligible you will be requested to supply additional information by February 1.

Town of Needham

Norfolk County

Enterprise Content Management System

November 20, 2020 Valid for 3 months



Bruce Cadman
Director of Sales
518-441-6496
BCadman@generalcode.com



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INTRODUCTION

RECOMMENDED SOLUTION

Based on the Town's current needs and looking to the Town's potential future uses of electronic content management, General Code recommends implementation of Laserfiche Avante.

Laserfiche Avante is a robust system that provides the flexibility to configure the system to your specific way of doing business without your having to "shoehorn" your processes to fit the mandates of a software solution. Laserfiche is also easily expanded — to different departments, different types of documents, and many other users in the future as you see other uses.

ABOUT GENERAL CODE

General Code provides a variety of information management solutions to more than 2,700 local governments, educational and commercial organizations throughout the United Sates. We set the standard for improving document management processes and are on the cutting edge of technology, providing new and reliable tools to our customers to better serve their clients. We pride ourselves in our level of experience, our technical knowledge in the industry and our focus on the customer.

General Code is a top 5 government reseller of Laserfiche in the United States, offering more than 14 years of experience, coupled with an industry-leading service, integration, training and helpdesk team.

With Laserfiche at the center of your Enterprise Content Management Solution, you get what nearly 30,000 other public and private organizations are already getting – the most powerful combination of electronic capture, storage and business process automation tools available today. We selected Laserfiche as our technology platform because of its open architecture, integration capabilities and the capacity to scale up as your demand for information sharing and access grows.

Every system designed and implemented by General Code fits your specific needs and requirements. Configuration of your Enterprise Content Management Solution to your situation reduces the time and additional resources required to "adjust" or "optimize" a one-dimensional system.

As a values-based company we adhere to the principles outlined in our "General Code." These guides for conduct are integral to building a comprehensive content management solution – one that leverages our 50+ years of service to public organizations and governments of all sizes.

Elements of our "code":

Digital information must be designed and implemented in ways that support the success of the entire organization.

Our content management solutions must run on a platform that we believe in.

The quality of our service and support determines the ultimate value of the solution we develop.

Our content management solutions are based on the practical—if there is a better way to do something we will design and implement it.



LASERFICHE AVANTE SYSTEM OVERVIEW

Today, successful organizations need more than document management; they need to optimize the decision-making process by getting the right content – whether structured or unstructured, paper or electronic, audio or video, photograph or e-mail – into the right hands at the right time.

Laserfiche Avante is a cutting-edge solution that combines comprehensive content management functionality with business process management (BPM) tools to both manage and process information — turning it into an asset that enables efficiency and smart decision making organization-wide. Laserfiche Avante provides all of the elements for today's comprehensive needs:

- Document Imaging Converts paper documents or film into an electronic or digital format.
- Document Management Manages documents (physical or digital) through their lifecycles.
- Business Process Management Applies workflow technology to content-related processes in order to standardize and optimize them.
- Integrative Middleware Provides many ways to interface with other business-specific applications
 to enable you to have <u>one</u> document repository that can be accessed from other applications and to
 enable "sharing" of data between other applications and Laserfiche.

The Laserfiche workflow engine gives you a platform to map, model and manage your business processes in order to obtain a better understanding of how to achieve your overall goals by:

- Increasing productivity by automating manual, repetitive processes.
- Modeling, executing and managing business processes without writing code.
- Triggering workflows based on actions taken in Laserfiche or in 3rd party applications, such as CRM, GIS, ERP and more.

Laserfiche Avante readily fits into your existing networked environment, without requiring custom programming or extensive hardware and software updates. Laserfiche is developed to support close integration with industry-standard operating systems and database management systems. See specifications in Appendix A for more detail.

Technology represents one of the most significant investments you make in your organization's success, and General Code and Laserfiche are committed to providing a comprehensive framework for delivering value quickly, easily and without the need to bring in expensive experts at every turn. General Code has seasoned professionals to guide you through the planning and implementation process and will be there to provide ongoing support.



PRELIMINARY DOCUMENT MANAGEMENT PROJECT PLAN

- I. Upon finalization of the agreement, General Code's Project Manager will call you to review the Project Plan and discuss the following:
 - Designate the main contacts for the project from General Code and your organization
 - Discuss the proposed schedule and set dates
 - Determine any necessary hardware purchases, installation or configuration that must take place prior to the system installation, and set a date for completion of that work
 - Confirm availability of required personnel, equipment and facilities
 - Address any outstanding questions, concerns or issues
- II. The Initial Design and System Implementation Phase will include the following:
 - Installation and configuration of the main server components
 - Installation and configuration of the named user licenses, including Laserfiche client software,
 Snapshot Plug-In and E-mail functionality, as well as scanner configuration and testing, if applicable
 - Complete system testing of all Installed components
 - A file structure review and creation of a hierarchical tree structure designed to maximize efficient use of the document management system
 - Discussion of file-naming conventions to be used in the document management system
 - Establishment of an initial set of templates (electronic index cards)
 - Configuration of users, groups and user rights (security)
 - Training for users
 - Administrator training for up to two (2) people who will be responsible for administration of the system



DESCRIPTION OF RECOMMENDED COMPONENTS

Laserfiche Avante™ Server Software

Laserfiche Avante MS SQL Express server software is a complete electronic content management solution with <u>fully integrated</u> business process management. Laserfiche Avante includes the Laserfiche Automated Workflow Module and other important business-process functionality "baked into" the core software.

The Laserfiche Automated Workflow Module is a robust component that facilitates the flow of documents, auto-files and auto-names folders and documents and enforces time schedules, where desired, by providing e-mail reminders or notifications to backups or supervisors or by re-assigning documents to others' folders. By automating processes, you can ensure that proper process is followed, and work can be distributed to users in an orderly and predetermined manner.

Laserfiche's robust security enables you to limit both access and functional rights of users. Your IT staff will appreciate the ability to set security by user or group, as well as the option to use Windows Authentication for single log-in.

System administrators have access to the Laserfiche Administrator Console either in a client or a web format.

Named Users

Laserfiche named users have the ability to utilize all of the features of the software, including scanning, importing, file and volume management, search and retrieval, annotations, e-mail routing and workflow participation, as applicable and as security rights permit. Additional named user licensees can be added at any time, in any increment.

SnapShot Functionality: The SnapShot functionality allows designated users the ability to "print" existing electronic files into the Laserfiche system directly and automatically convert them to inalterable Laserfiche images rather than having to print them out and then scan them into the system.

E-Mail Functionality: The E-Mail Plug-in allows users to send Laserfiche documents as e-mail attachments to anyone using a MAPI-compatible E-mail system. All or part of a document can be e-mailed; multiple files can be "zipped" into one e-mail; and you can choose the format in which the documents will be sent (e.g., PDF, TIFF, JPEG, etc.).

Web Access: Laserfiche Web Access is a browser-based thin client offering virtually all of the document management capabilities of the thick client interface. Authorized users organization-wide can simultaneously access documents, whether they are accessing Laserfiche from their desks or a remote location. IT can add new

users without installing software on individual workstations. Users access Laserfiche through a Web browser. Authorized users scan, index and otherwise manage documents with Web Access. Staff can also search, retrieve, create, move, rename and annotate documents from the Web, as well as participate in workflow processes. Web Access has real-time access to the Laserfiche repository, which means that information input into Laserfiche is instantly available to all users, whether connected directly to your server, or using Web Access. Also included with Web Access is the Laserfiche SharePoint integration. Laserfiche was the first electronic records management solution to obtain joint Department of Defense records management certification with SharePoint. Laserfiche Web Access also provides real-time access to your Laserfiche repository through the use of mobile devices. The Laserfiche iPad and iPhone apps provide impressive access, and Web Access Light is very useful for other tablets and mobile phones. Laserfiche mobile and Web Access Light are included with Web Access.

Laserfiche Mobile/App is an app that lets you capture, upload, and securely access and work with documents in and outside your Laserfiche repository while on the go. You can review and submit forms from the app as well. You can browse for documents in a folder structure; search the entire repository or a specific folder; create, copy, move, rename, sign, download, print, and delete documents; modify document fields; view annotations; submit and approve forms; view and work with offline documents and forms; and start and view business processes. Additionally, you can add documents to your repository from other apps, the mobile device's gallery, or its camera. Gallery and camera images can be processed and enhanced for easier viewing.

Laserfiche Forms Essentials comes with all Laserfiche Rio and Avante 10.2.1 installations and upgrades. All full named users can sign in to Laserfiche Forms, submit forms, access tasks, and perform any other action in Laserfiche Forms that their Laserfiche Forms security settings allow them (e.g., creating or administering business processes). These users are automatically retrieved from the Laserfiche Server and are managed on the System Security page in Laserfiche Forms. Forms Essentials Full Users have access to the core features necessary to design processes and forms. Essential Users also have access to the Operational Dashboard where they can view statistics on process in progress.

Laserfiche Forms Automation* Laserfiche understands that forms are a key component of many organizational business processes. If the base ECM application is considered

*limited to installation on one server

optional

the "engine," many consider automated forms the "transmission" that drives paperless business processes.

Therefore, Laserfiche has designed forms automation solutions to help you integrate this key element into your overall ECM strategy:

- PDF Forms Automation through Laserfiche Workflow. Built into the
 core Laserfiche Workflow are activities specifically designed around
 automating PDF forms. Some of these workflow/process activities
 include: retrieving values from a PDF form and storing them as tokens;
 pre-filling portions of a PDF form; verify PDF signatures, and more.
- Laserfiche Forms Professional is a product that provides a solution for
 organizations to build web forms and manage their business processes.
 Laserfiche Forms has a drag and drop graphic user interface which
 allows business users to easily model their processes and design the
 forms associated with the process. The web based application provides
 out-of-the-box integration with the Laserfiche ECM suite, as well as the
 ability to automate complicated processes and integrate with external
 systems. You can set security levels to designate administrators or users
 for each process. Also, you can assign a form to a specific user or group,
 making team collaboration easy and secure.
- Forms Portal expands the functionality in Laserfiche Forms to include publicly available forms that users can fill out anonymously. Without Forms Portal, users must sign in before filling out any forms. Forms Portal is licensed per instance, meaning you have a separate Forms Portal activation key in addition to your standard Forms activation key. If you have the Forms Portal, anybody can submit a form. Public users do not need to sign in to Forms or have a Laserfiche account.

INVESTMENT DETAIL & OPTIONS

Hardware or any applicable taxes are not included in price, unless otherwise noted.

Line Item Description	Model#	Quantity	Unit Price	Total
Base Software				i Utai
Avante Server for SQL Express with Workflow	MSE10	1	\$1,500.00	\$1,500.0
Avante Named Full User with Snapshot, Web Access & Email	MNF16	10	\$600.00	\$6,000.0
		Base Soft	ware Subtotal	\$7,500.00
Support				The state of the s
LSAP Avante Server for SQL Express with Workflow	MSE10B	1	\$300.00	\$300.00
LSAP Avante Named Full User with Snapshot, Web Access & Email	MNF16B	10	\$120.00	\$1,200.00
		Sup	port Subtotal	\$1,500.00
Professional Services	A STATE OF THE PROPERTY OF THE		· ·	
Laserfiche Install and Training On-Site Days		1.5	\$1,650.00	\$2,475.00
Laserfiche Project Management		1	\$300.00	\$300.00
Remote Services		1	\$500.00	\$500.00
	Pro	fessional Sen	rices Subtotal	\$3,275.00
		***************************************	Grand Total	\$12,275.00

Anticipated annual LSAP fees after the included 1st year for the above configuration would be \$1,500.00 Note: This estimate is subject to change based upon the then-current support prices for that year.

Automated Workflow Module and Electronic Forms (software) is included with Laserfiche Avante. If/when the client wishes to implement Automated Workflow and Electronic Forms, there will be additional development, configuration and training time required. We will be happy to assess any Workflow implementation desires with you and provide any relevant fees at your request. (Fees will be based on the number and complexity of the desired workflows to be implemented.) These additional service fees would not apply until you are ready to implement this component.

Optional Components:

OPTIONAL COMPONENT Add-Ons/Plug-ins	Ś			
Avante Forms Portal Add-on LSAP Avante Forms Portal Add-on	MPFRM MPFRMB	1	\$7,995.00 \$1,599.00 Item Subtotal	\$7,995.00 \$1,599.00 \$9,594.00
Avante Forms LSAP Avante Forms Public Access to Records	MFRM16 MFRM16B	10 10	\$50.00 \$10.00 Item Subtotal	\$500.00 \$100.00 \$600.00
GC Streamline Public Records Access Business Process Automation		1	\$7,370.00 Item Subtotal	\$7,370.00 \$7,370.00
SAP GC Streamline Public Records Access Business Process Automation	GCSL1_SAP	1	\$749.00 Item Subtotal	\$749.00 <i>\$749.0</i> 0

1. Adjustments to Performance Schedule; Rescheduling.

Adjustments to Schedule. Upon the mutual consent of the Town and General Code, the "Performance Schedule" may be changed or extended as outlined below.

Rescheduling. The Town must notify General Code, in writing, immediately upon learning or otherwise becoming aware, of any difficulties that may delay the delivery of services or deliverables. Such notification must identify the reason for the delay, as well as the anticipated period of delay.

Travel-related penalties incurred by General Code due to a change in the Installation / Training schedule by the Town may be charged directly to the Town unless the delay is a result of a state of emergency.

2. Contract Cancellation Policy.

If the Town chooses to cancel this contract, it must do so in writing. The Town will be billed for the following contract-related expenses incurred and services provided up to the receipt of written contract cancellation, including:

- · Any and all travel-related expenses incurred by General Code,
- Any and all consultation, installation and training services performed by General Code,
- Any and all software-related expenses incurred by General Code as per the Laserfiche Software Return Policy.

3. Laserfiche Software Return Policy:

- Unopened and not activated products can be returned within 30 days from the date of purchase at no charge.*
- Unopened and not activated products returned between 31 days to 120 days from the date of purchase will incur a 15% restocking fee on the original purchase price.*
- There is no return of products over 120 days from the date of purchase.
- There is no return of products that have been opened or activated.

*Return Credit, less applicable charges, will only be given after Laserfiche receives a letter of confirmation that the software was not opened or activated.



SOFTWARE ORDER, PAYMENT AND PERFORMANCE SCHEDULE

All software components will be ordered approximately three weeks prior to installation and shipped to customer. The software maintenance (annual support) will start 30 days after software order.

- \$9,000.00 of the project price shall be invoiced upon the order of the software and support
- \$3,275.00 of the project price shall be invoiced upon completion of the installation and training.

(Client please fill out) Invoice for this Project to be sent to:			
	tment: Contact Name:		
TOWN OF NEEDHAM, NORFOLK COUN			
Ву:	In the Presence of:		
Title:	Title:		
Date:	Date:		
GENERAL CODE, CMS, LLC			
Ву:	In the Presence of:		
Title:	Title:		
Date:	Date:		
In order to authorize the project:			

- 1. Sign the Proposal
- 2. Fax or email the Authorization & Agreement Section only to: ICCCDS@generalcode.com fax (585) 328-8189
- 3. Mail the signed Proposal to General Code at: 781 Elmgrove Road Rochester, NY 14624

Upon request General Code can sign and mail a copy of this agreement back to the Municipality for its records.



AUTHORIZATION & AGREEMENT

The **Town of Needham, Massachusetts** hereby agrees to the procedures outlined above, to General Code's Content Management Solutions Terms & Conditions and to the License Agreements for the software referred to above, all of which are available at http://cms.generalcode.com/terms-conditions, and are incorporated herein by reference, and authorizes General Code to proceed with the project.

Ele	Estir	nic Document Management Project mated Annual support fee second year forward (LSAP): \$1,500.0 e: This estimate is subject to change based upon the then-curren	
<u>Op</u>	tiona	al Components: Please check any optional component to b	e included:
	0	State Contract Option (for the base project): (For any options added to the base project, add 5% surcharge f	\$613.75 for State Contract option.)
		Please process this agreement through a State Contract Option	on .
		Procurement of this contract will utilize a service for pricing and of General Code's signed agreement, a formal quote will be iss Town. The Town will issue a P.O. to said servicing organization be conducted between this servicing organization and the Tow training and support will be conducted by General Code.	ued by servicing organization to the , and all invoicing and payments wil
		PLEASE NOTE: If this option is not selected and included below, the Town is obtaining respective quote(s) directly from the State Contro Code with a Purchase Order. If General Code is required to be process, an appropriate service fee will be imposed via Change	ect Vendors and providing General secome involved in said solicitation
		Laserfiche Avante Forms Professional LSAP (Second year forward): \$100.00	\$600.00
		Laserfiche Avante Forms Portal (allows for Public Access) LSAP (Second year forward): \$1,599.00	\$9,594.00
		GC Streamline for Records Access LSAP (Second year forward): \$749.00	\$8,119.00
Postanova	1	Note: Forms and Forms Portal are required to implement the GC Streamli	ne Records Access process
	-con-merging	Electronic Document Management Solution:	\$12,275.00
		Optional Component(s), if selected: +	CONTRACTOR (CONTRACTOR CONTRACTOR



Estimated Total Investment:

APPENDIX B - INSTALLATION, TRAINING AND SUPPORT

Pre-Installation Teleconference and Technical Review

Prior to the on-site installation and training, one of General Code'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, Hands-On Training

General Code provides practical hands-on 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. Our training experts will come on-site to your facility and provide thorough training for your staff with manuals customized to your specific system and needs. 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.

Laserfiche Software Assurance Plan (LSAP)

LSAP is renewable on an annual basis and was created to deliver critical program updates and provide ongoing technical support for your Laserfiche document management system. With LSAP you will always be confident that you are receiving the very best performance and quality possible.

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 Ifsupport@generalcode.com. With Basic LSAP service, technical support requests not immediately addressed will be acknowledged within 8 business hours, with the majority of response times within 2 hours. General Code'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

APPENDIX A – RECOMMENDED SERVER/WORKSTATION SPECIFICATIONS

Please click on the below links to view current specifications:

Laserfiche Avante Minimum Recommended Hardware Specs

Laserfiche Default Ports

Virtualization Considerations for Laserfiche



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 LSAP 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 General Code 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. General Code 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. General Code 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 LSAP:

- 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
- Access to TIPS and FAQs on the General Code website
- User group meetings
- Access to Laserfiche's knowledgebase
- Regular newsletters Laserfiche & The Decoder
- Access to webinars

Services not covered under LSAP:



- 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:

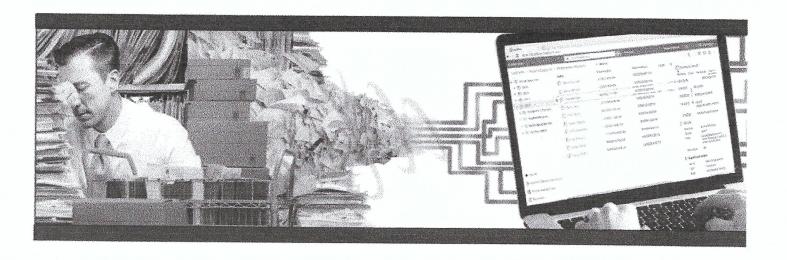
- To maintain appropriate backups of the Laserfiche database and associated files.
- To contact General Code prior to implementing significant network changes that has the potential to
 impact the Laserfiche system. Some examples are, operating system changes on either the server or
 PC, replacement 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 General Code's Support Technician sufficient information to be able to diagnose and reproduce the problem, including any identified error codes.



Town of Needham, MA

Marriage Books

November 23, 2020 Valid until 12-31-2020



Document Management Solution
Scanned Image Indexing and Processing Services

Bruce Cadman Director of Sales 518-441-6496

BCadman@generalcode.com

DOCUMENT CONVERSION / PROJECT DELIVERABLES / INVESTMENT DETAIL

DOCUMENT CONVERSION PROJECT

Reference is made to the Document Scanning Proposal between Image Data Inc and Saratoga County, NY.

PROJECT DELIVERABLES

The following deliverables are included in your project pricing. As we do not have the proposal from our vendor partner, Image Data Inc, this price is based solely on the information /assumptions as set forth below.

- The document conversion services associated with the project will be performed by Image Data Inc.
- Upon completion of the scanning and indexing portion of the project by Image Data Inc, Image Data Inc will upload the image files to General Code.
- Once received from Image Data Inc, General Code will process the images and index data into Laserfiche Viewer format and upload same onto Laserfiche system, if owned.
- General Code is not responsible for the accuracy and quality of the images (e.g., black borders, skewed
 images, blurry images, non-legible images, etc.), index data or other errors on the scanning portion
 provided to General Code by Image Data Inc.
- One (1) copy of the Laserfiche Viewer formatted documents will be provided on removable media.

PROJECT MANAGEMENT AND OTHER SERVICES

- Our charge includes project management and assumes that all the documents contained in this project will be imaged and provided by Image Data Inc to General Code.
- Project Management will include job setup, creation of file structures and databases (as applicable) and Laserfiche Viewer containing images and data on removable media.
- Placement of the shipped documents in your repository will be performed as a courtesy service upon request.
- To schedule the placement of the documents, please contact Mike Rizzo at 855-GEN-CODE.



INVESTMENT DETAIL

Our price is based upon the information set forth above and is valid until 12-31-2020.

	Est. of Images	Est. of Documents	Unit Price	Extended Price
Document Keying/Indexing on selected documents for population of template fields, creation of document naming and folder structure.		93	n/a	n/a
Data Processing/Upload services on all records into Laserfiche, including applying templates and indexing to images, file naming and folder structure creation.	16,275	Silvery Control of the Control of th	Flat Charge	\$ 700.00
OCR of Documents: Utilizing OCR processing on all documents to extract type-written text. OCR will only identify type-written characters printed from left-to-right on the page.	16,275		\$ 0.006	\$ 97.65
Delivery Fee per delivery for processing, copying, delivery and upload of backfile documents.		1	\$ 300.000	\$ 300.00
Project Management and other related services including job s database (as applicable) and Laserfiche viewer containing image	etup, creat es and data	ion of file struc on removable	tures and media.	Included in per-image price
Total In	dexing, Pro	cessing/Uploa	d Pricing:	\$ 1,097.65

Document Indexing/Processing Specifications

Decument Type / De		Est. of images	Est. of Documents
Minute Books (93 Bound & Unbou	nd)	16,275	93
Index Field(s)/Keying	Title		ar tarenda en substituti de la companya de la comp Companya de la companya de la compa
Who is Keying/Indexing	Image Data		erenteren granten autzahrina auszakai zuten berenteri erenteri erenteri eta barren erenteri erenteri erenteri e
Document Naming			an and the state of the section of the state
Convention	Title		
Document Organization			
(Folders)	Town Clerk/Vital Re	cords/Marriages/Books/file	
Microfilm needed?	No		
Comments / Special	A CONTRACTOR OF THE PROPERTY O		
Instructions			

AUTHORIZATION & AGREEMENT

Town of Needham, MA hereby agrees to the procedures outlined above, to General Code's Document Management Solution Terms & Conditions which are available at http://cms.generalcode.com/terms-conditions and are incorporated herein by reference as they apply to this proposal, and authorizes General Code to proceed with the project.

Processing/Uploading of Scanned Images into Laserfiche: \$1,097.65

SHI Option estimate an additional 6% \$65.86

Payment Schedule:

General Code will invoice for processing services upon shipment of each batch of the scanned documents.

Performance Schedule:

The project will be completed within 90 days of General Code's receipt from Image Data Inc of all materials necessary to complete the project.

(Client please fill out) Invoice for this Project to be sent to:				
Department:	Contact Name:			
TOWN OF NEEDHAM, MA				
Ву:	In the Presence of:			
Title:	Title:			
Date:	Date:			
GENERAL CODE, CMS, LLC				
Ву:	In the Presence of:			
Title:	Title:			
Date:	Date:			

In order to authorize the project:

- 1. Sign the Proposal
- 2. Fax or email the Authorization & Agreement Section only to: ICCCDS@generalcode.com fax (585) 328-8189
- 3. Mail the signed Proposal to General Code at: 781 Elmgrave Road Rochester, NY 14624



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Town of Needham, MA

Upon request, General Code can mail a signed copy of this agreement back to the Municipality for its records.





For Town of Needham, MA

Submitted: November 20, 2020

Submitted By: Laurie Green Senior Account Executive Image Data, Inc. (518) 862-2740 Igreen@imgdata.com

Statement of Services Scope of Work

1.0 OBJECTIVE

The objective of this proposal is to provide preparation and book scanning for the Town of Needham's Marriage Books. The project will be converted in our Albany, New York production facility according to the requirements detailed in this Statement of Work.

Image Data Team will work closely with the designated representatives from the Town of Needham throughout the term of this project to provide for a smooth, timely, confidential and successful partnership.

2.0 SUMMARY OF CONTENTS

The following sections are included in this SOW:

Production Contacts

Pickup and Delivery

Conversion Services

Transmission of Images

Post Scan Indexing

Delivery and File Back-up

Facility, Production and QC Overview

Pricing Schedules

3.0 PRODUCTION CONTACTS

The conversion will be managed by a team consisting of the following Image Data individuals, who will be responsible for completion of production activities.

1. Kara Heniges (518) 862-2740 ext. 1030

Operations Manager

2. Ken Major (518) 862-2740 ext.1023

Director of IT

3. Laurie Green (518) 862-2740 ext.1021 Senior Account Executive

4.0 PROJECT PICKUP AND DELIVERY SCHEDULES

The Town of Needham will box all records for pick-up by driver and delivery to Image Data's production facility in Albany, or for shipment to Image Data. Shipment method, dates, schedules and volume of boxes to be determined.

Based upon the supplied image volumes, Image Data anticipates the production time on a typical pick-up to be 60 to 90 days from the date of pick-up.

5.0DOCUMENT PREPARATION

Document preparation will be needed to remove staples, paperclips, sticky notes and documents from books prior to scanning and will be completed by IDI.

6.0 CONVERSION SERVICES

Documents will be scanned at 300 DPI to black and white, TIFF images. Image Data will provide a POC of the images and directory formats for approval by the Town of Needham prior to entering into production.

- Books are a mix of bound and un-bound
- Total of 93 books
- For bound books, do not cut spine
- 8 books have pages in plastic sleeves
- Do not scan attachments
- Nothing larger than 11x14
- Capture fronts only of pages, do not scan backs regardless of content
- All pages in plastic will be scanned in the plastic sleeve- (the images will be completely legible but may affect image sharpness)

Image Data is not able to improve the quality of a poor original. If poor quality originals are found, a "Best Image Available" document may be scanned prior to the original imaged document.

7.0 TRANSMISSION OF IMAGES

Data will be transmitted to General Code for upload into Laserfiche software. NOTE: Load fees into LF are not included in this proposal and will be provided separately by General Code.

8.0 POST-SCANNING INDEXING & ORGANIZING

IDI will index the images as follows:

• Title on front or spine of book

9.0 DELIVERY & FILE BACK-UP

Once the file organization naming and indexing is complete your electronic records are ready to be delivered to the Town. The files may be brought into your existing Laserfiche system or you can store the records on the provided Laserfiche Viewer

10.0 IMAGE RETRIEVALS DURING PRODUCTION

While the Records are at Image Data during production, a process will be determined for easy access to the images when requested. Requests by Authorized Representatives from the Town of Yorktown can be made via email and delivered via email, FTP, FedEx or UPS. The cost to would be \$17.00 per retrieval plus the imaging fee.

Retrieval: One record pulled from one file = one retrieval. All FedEx, USPS, UPS, or other ground service costs incurred are not part of this pricing structure and will be billed accordingly.

11.0 SERVICE LEVEL AND RETENTION

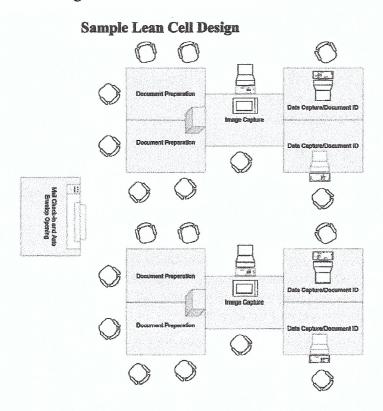
Documents will be returned to the Town of Needham once scanning is complete.

12.0 PRODUCTION AND QUALITY CONTROL (QC) OVERVIEW

Lean Sigma Cells

All IMAGE DATA centers operate in a Lean Sigma Cell design. This design ensures efficiency by eliminating delays in any work queue. Work is not stacked or bottlenecked with the possibility that errors may be contained in an over produced work station. With this workflow design, all elements are synchronized to maximize a daily throughput rate by balancing and managing workloads at each station of the cell. The error prone design of separating prep/imaging/index/document identification within different areas of the room is not utilized by Team IMAGE DATA. Errors are virtually eliminated by employees working side-by-side to ensure that process or product deficiencies are reported to the previous station. This flow enables the Lean Cell to find and correct deficiencies instantly, ensuring that the correction is made at the time of occurrence. In addition, our Lean Sigma work cells process the information in smaller batches, resulting in faster net throughput times. Fast processing times promote the turnaround times required and ensures quality assurance checks continue to be completed in conjunction with deliverable times. Team IMAGE DATA will create a lean cell for each unique task order under this agreement.

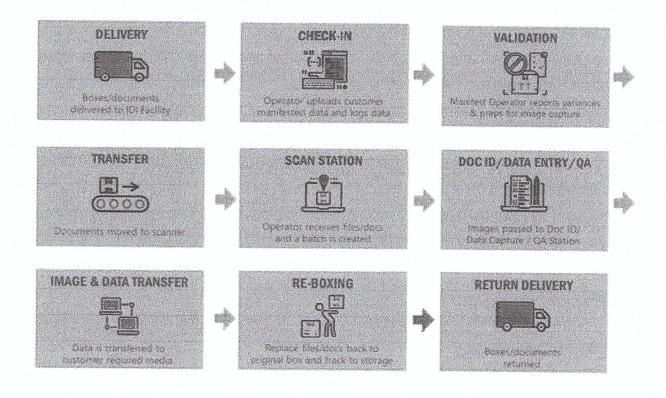
Lean Sigma continuously improves overall production and eliminates errors resulting in providing the Town of Needham higher quality images and data with the highest accuracy levels and at the same time lowering overall costs to our clients.



Production Planning and Process Control Activities

The Production phase commences with the transfer of project knowledge from Ramp up to production personnel through systematic training. A team of cross-functional personnel carries out the production activities. This team is dedicated to meet the customers' requirement in terms of quality, timeliness and other deliverables. The cross-functional team contains expertise for document preparation, conversion instruction, ramp up, software, and production planning activities.

The initial activity in the production phase is the creation of the project management/implementation plan that describes the quality objectives, the project deliverables, project schedules, resource requirements, training schedules, risk assessment, risk mitigation plans and individual responsibilities towards meeting the project targets and deliverables.



The following are examples of quality measures within the project:

Document Preparation - Paper Audit (If warranted)

- IDI will insert a "File Level" barcode sheet as well as "Document Type" barcode labels on the various document types within the file.
- Paper files will be audited to validate the document preparation process is complete and accurate prior to being sent to the scanning area.

Scanning - Attended Mode QC

- · Scan in "Attended Mode" to assure that the best quality image is rendered
- Visually inspects each image as it is captured and interrupt scanning if any issues that comprise image quality are detected such as double feeds, folded corners, light images, dark images etc.
- While attended mode scanning is slower that unattended scanning, it provides the first line of image quality control and avoids re-scanning documents.
- IDI unitizes auto-blank page deletion when dropping the back side/page of a paper document with no
 content. This process is over 99% effective/accurate provided the backs are clean of smudges and
 darkened areas. With this process, backs with content will not be deleted but backs that have content,
 dark areas, or smudges will remain and be part of the image transfer stream.

Image Clean-up Processes

- · Image processing includes de-skew, de-speckle, black border removal and crop.
- IDI utilizes state of the art production scanners and image processing technologies to render the best possible electronic document images comparable to the quality of the original documents.
- Set-up entails scanner adjustments to assure the accurate and complete capture of the documents.

Post Scan Automated QC

- QC steps are looking for a corrupt image, large image file size, etc.
- In addition other steps are typically introduced which may include:
- · Manually review blank backs and delete.

Post Scan Visual QC

• After the automated QC has completed, a QC operator will perform visual QC of images and data prior to sending the batch to "Release". This is a random effort after all errors in the process have been corrected.

Workflow QC

• If discrepancies are found within a batch in any step of the conversion process, then the entire batch is directed to Quality Control Module and re-processed to correct identified issues.

Post Release QC

• An automated process is run against the batch to ensure all images and data have been written properly and none are corrupt.

TOWN OF NEEDHAM

Pricing Summary

Needham, MA
Marriage Vitals-- Books

Description # Books/Units Images

Marriage Records 93 16,275

One-time set-up

Pick-up
Return

Note: Pricing is based on the document samples reviewed and outlined in this proposal. Other documents not described for these same and other departments may need review for valid pricing points.

IDI expects documents to be in orderly condition, not damaged by water or other contaminates, with easily identifiable index fields and light to medium prep of documents. If these conditions do not exist, boxes may be rejected, or price increase may apply.

Above is the complete list of services priced in this agreement. Other services required and not outlined in this enclosure should not be implied.

Pricing is based on the quantities listed in this proposal. If the images are more or less than 10% of the assumed quantities, the per-image price is subject to change based on the number of images actually submitted.

Authorization & Agreement

The **Town of Needham** hereby agrees to the procedures outlined above and authorizes Image Data to proceed with the project.

Note: pricing is based on the quantities listed in this proposal. If the images are more or less than 10% of the assumed quantities, the per-image price is subject to change based on the number of images actually submitted. Pricing is also based on site review and specifications included in this proposal.

In witness whereof, this agreement has been executed by a respective signatory of each party whose signature appears below and is on the date of this Agreement duly authorized by all necessary and required corporate action to execute this agreement.

Customer: Town of Needham Address: 1471 Highland Ave. Needham, MA 02492	Vendor: Image Data, Inc. Address: 18 Petra Lane Albany, New York 12205
Name:	Name: _Laurie Green
Printed:	Printed: Laurie Green
Title:	Title: Senior Account Executive
Date:	Date: November 20, 2020



Pricing Proposal

Quotation #: 17707647 Created On: 9/10/2019 Valid Until: 12/17/2020

Town of Needham

Inside Account Manager

Theodora Eaton

1471 Highland Ave. Needham, MA 02492 United States Phone: 781-455-7500

Fax:

Email: Teaton@needhamma.gov

Josh Donnelly

290 Davidson Ave Somerset, NJ 08873 Phone: 800-527-6389 EXT 555-xxxxx

Fax:

Email: josh_donnelly@shi.com

All Prices are in US Dollar (USD)

	Product	Qty	Your Price	Total
1	Marriage Records Image Data, Inc Part#: Contract Name: Software Reseller Contract #: ITS58 Note: 93 Books/Units	16275	\$0.61	\$9,927.75
2	One-time set-up Image Data, Inc Part#: Contract Name: Software Reseller Contract #: ITS58	1	\$239.36	\$239.36
3	Pick-up Image Data, Inc Part#: Contract Name: Software Reseller Contract #: ITS58	1	\$452.13	\$452.13
4	Return Image Data, Inc Part#: Contract Name: Software Reseller Contract #: ITS58	1	\$452.13	\$452.13
5	Project Management SHI CONFIG - Part#: Contract Name: IT Project Services Contract #: ITS74	1	\$500.00	\$500.00
			Total	\$11,571.37

Additional Comments

Hardware items on this quote may be updated to reflect changes due to industry wide constraints and fluctuations.

Thank you for choosing SHI International Corpt The pricing offered on this quote proposal is valid through the expiration date listed above. To ensure the best level of service, please provide End User Name, Phone Number, Email Address and applicable Contract

please contact an SHI Inside Sales Representative at (888) 744-4084.

SHI International Corp. is 100% Minority Owned, Woman Owned Business. TAX ID# 22-3009648; DUNS# 61-1429481; CCR# 61-243957G; CAGE 1HTF0

The products offered under this proposal are resold in accordance with the terms and conditions of the Contract referenced under that applicable line item.