



Council Agenda Report

From: David McCue, Information Technology Manager

Subject: Laserfiche Document Management System – Software Purchase and Implementation

Date: July 16, 2019

Facts

1. Paso Robles Police Department, with the help of Complete Paperless Solutions (CPS), installed the Laserfiche Document Management System (DMS) back in 1998. That system has been in continuous use including routine upgrades and maintenance to keep it current. Arrest records are securely stored and transmitted to the District Attorney in digital format.
2. This successful system needs to be expanded to other departments in the City as they need this electronic document management system in order to create a repository where public records for the City Clerk, Public Works and Community Development can be stored, organized, and searched. Police Department records would continue to be kept in a separate repository for security.
3. The Building and Planning Divisions are currently scanning historical records to reduce paper storage, improve accessibility to staff, and allow on-line accessibility by the public.
4. Fiscal Year 2018-19 included a \$79,000 budget for a city-wide document management system, which includes separately purchased computer systems, this software and its installation/configuration/training, along with \$9,000 for annual maintenance.
5. Because of our ongoing and successful relationship with our existing Laserfiche provider, CPS, we requested a proposal for software licenses, implementation, configuration, and support.

Options

1. Take no action;
2. Authorize the City Manager to enter into an agreement with Complete Paperless Solutions (CPS) to implement Laserfiche Document Management System for all City departments, in an amount not to exceed \$49,200;
3. Provide alternative direction to staff.

Analysis and Conclusions

Historically, the City of Paso Robles has not engaged in a citywide initiative to utilize technology for document storage or records management, or to disseminate public documents to the community. Certain departments have engaged in creating electronic versions of filed documents, but those efforts have been limited to simply scanning documents into individual PDF files stored on a server. Searching through those files is cumbersome and sometimes fruitless. A DMS—like Laserfiche—creates a database with information about the documents (called “metadata”) where details such as key words, dates, document types, the person who scanned it, and the retention schedule are all recorded with the scanned image. A DMS makes the documents searchable and filterable, making search results more relevant and reliable.

Other than those efforts, most city documents exist only in hard copy. Having documents only in hard copy decreases internal staff efficiency and effectiveness, and negatively impacts our ability to make

information available to the public. Hard copies of documents must be stored either onsite (in very limited space), or offsite in a storage facility that charges the City for storage and retrieval.

Laserfiche software is a popular vehicle for electronic document management, and has multiple add-on modules including workflow business process automation and electronic forms. It is compatible with the City’s existing enterprise technology solutions, and its use will improve the retention and security of important documents and records. Records that have already been scanned or electronically archived can be directly imported into Laserfiche.

The basic modules would be initially deployed in the Community Development Department and the City Clerk’s office, then expanded to other departments. Laserfiche software is already used daily by the Police Department to store and send arrest records to the District Attorney.

This solution is highly adaptable and could be deployed for a variety of City functions, both now and over time, including other modules not noted here (see Attachment 1: CPS Laserfiche Proposal, for additional modules).

The proposal includes the following modules:

Laserfiche Avante (Descriptions):	Quantity	Price
Laserfiche Avante Server, incl. Workflow	1	\$ 5,000
	30	18,000
Laserfiche Public Portal Starter	1	15,000
Professional Services:		
Project Management	1	1,600
Installation and setup	1	1,600
Training: Admin Level I + End user (multiple classes)	2	3,200
Planning documents Import	1	1,600
Retention Schedule Implementation	2	3,200
Support Services (LSAP Basic Support):		
Laserfiche Avante Server	1	1,000
Laserfiche Named users	30	3,600
Laserfiche Public Portal Starter	1	3,000
Discount		-7,600
Total Turnkey Solution		\$49,200

Fiscal Impact

The proposed solution includes the Laserfiche Software Assurance Plan (LSAP) for one year in the amount of \$7,600, with options for annual renewal.

Fiscal Year 2018-19 included a \$79,000 budget for a city-wide document management system along with an annual amount of \$9,000 for maintenance, so this implementation agreement fits within those parameters. Funding will be carried over from Fiscal year 2018-19 to 2019-20.

Recommendation

Authorize the City Manager to enter into an agreement with Complete Paperless Solutions (CPS), for implementation of a Document Management System using Laserfiche, in an amount not to exceed \$49,200.

Attachments

1. CPS Laserfiche Proposal
2. Professional services agreement

LASERFICHE AVANTE PROPOSAL

City of Paso Robles

BY COMPLETE PAPERLES SOLUTIONS - ANAHEIM, CALIFORNIA



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Anaheim, CA 92807
tel: 866-661-2425 fax: 714-716-8215
www.cps247.com

Letter of Transmittal

May 30, 2019

City of Paso Robles
821 Pine Street, Suite A
Paso Robles, CA 93446

Dear Caryn,

We are pleased to submit the attached proposal for the Laserfiche Avante – 25 named users and 5 concurrent read only users.

Complete Paperless Solutions (CPS) is a certified Value-Added Reseller (VAR) of the award-winning Laserfiche™ Enterprise Content Management solution as well as a respected systems integrator and consultancy.

The CPS staff focuses its business on helping Municipalities like the City of Paso Robles to meet the challenge of providing a great public service to your citizens while working in a high-demand, electronic records-intensive environment.

Our support and professional services team has over eighty years combined experience with the proposed services and solution and is currently maintaining over one hundred and thirty similar systems in the United States.

We would be pleased to discuss any aspect of this proposal and to provide additional information related to our proposed solution or ability to deliver.

We look forward to your positive review of this proposal and to answering any questions that may arise.

Sincerely,

Claude Schott
Vice President of Sales

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1. Company Profile

Complete Paperless Solutions (CPS) is headquartered in Anaheim with offices in Paso Robles and Vista. CPS has been in business since **1996** and is an **employee owned company** and employs ten (10) staff members. CPS is currently assisting and supporting over one hundred and fifty clients on a nationally with the majority in California and the minority in Florida, Louisiana, Massachusetts, New York, Pennsylvania, Texas and Wisconsin. **CPS has the highest ratio of support engineers per customer in California compared to all other Laserfiche resellers.** CPS is also a proud sponsor of **MISAC, CCUG, CLEARs, CLETS and CCAC.**

With over 80 years of combined experience in content management know-how, CPS is an award-winning, premier reseller of Enterprise Content Management Products (ECM). In fact, over the years we've become California's "go-to" ECM vendor of choice. CPS's portfolio of skills includes: full in-house support, business and systems analysis and development and customization resources. Our ability to integrate with existing applications and make content management "*work how YOU work*" is unparalleled. Additionally, both private and public-sector clients recognize that CPS is "THE" systems integrator when it comes to meeting both governance and compliance statutes. Whether implementing a paperless-invoicing process or enhancing client/case management, CPS has created and implemented systems for law enforcement, clerks' offices, county and local governments, courts, schools, legal services, property management, billing services, manufacturing and many, many more.

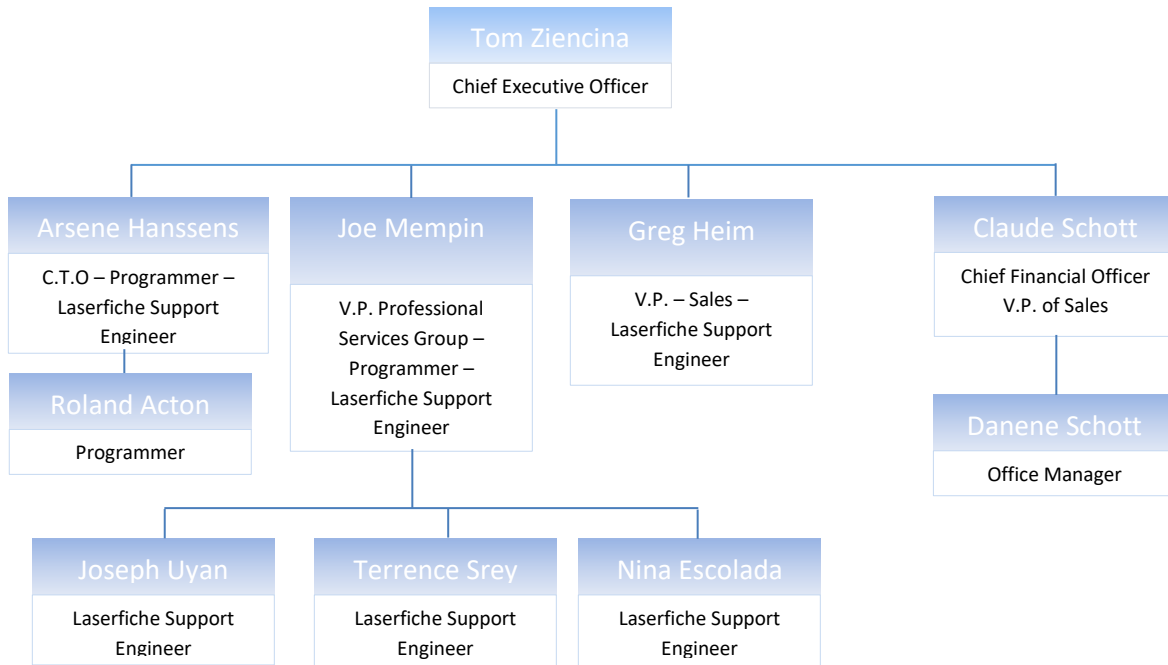
A representative sampling of some of our customers would include the Cities of Bakersfield, Big Bear, Chowchilla, Claremont, Cerritos, Commerce, Covina, El Centro, El Monte, El Segundo, Encinitas, Fontana, Fountain Valley, Gilroy, Huntington Beach, La Habra Heights, Irwindale, La Quinta, Lodi, Menifee, Montclair, Montebello, Murrieta, Petaluma, Pismo Beach, Porterville, Poway, Rancho Mirage, Redondo Beach, Rosemead, San Bernardino, Santa Clarita, Seal Beach, Taft, Torrance, Westminster and Yucaipa just to name a few.

The first Laserfiche installation by CPS was in 1997 for the San Luis Obispo Sheriff Department who is still using Laserfiche and has been with CPS for 21 years. Our customer centric business model promotes long term relationships stemming from excellent service, fair pricing and good old-fashioned knowhow.

Our largest implementation is Spindletop of Beaumont Texas and part of the East Texas Behavioral Health Network (ETBHN). Spindletop has a Laserfiche RIO solution that includes 227 named users, 1,546 read only users and a Public Portal for unlimited users.

We would also like to mention that 70% of our customer base was implemented by CPS while the other 30% was inherited from other Laserfiche Certified Resellers who did not meet the customers' expectations

a. Organization Chart



b. Project Team

The Anaheim office staff and software engineers will provide service and support for the City of Paso Robles PD and will assist you in the support, design, implementation, and training of the Laserfiche application. We currently have six (6) software engineers and three (3) application developers.

Communication between the City of Paso Robles PD and CPS will be the essence of a successful implementation. Therefore, **Claude Schott** will be the executive coordinator and main contact. Claude has over twenty years of experience in document and record management industry and is currently the Vice President of Sales for CPS. Claude joined the team in 2004. Prior to joining CPS, Claude was the President and CEO of Allgeier Computer a Laserfiche Value Added Reseller (VAR). Claude holds a Master degree in Finance, International Marketing and Sales.

CPS' Professional Services team lead by **Joseph Mempin** will assist the City of Paso Robles in the implementation of the Laserfiche Avante.

Joe Mempin: Manager of Professional Services Group (PSG) – Certified Laserfiche Professional

Over fifteen (15) years of software programming and Laserfiche experience, including integrations and customizations of client software systems, legacy programs, and Laserfiche. Mr. Mempin has been managing the CPS team for the past ten (10) years. Previously he spent five (5) years developing application systems for Allgeier Computer (previous Laserfiche VAR).

Notable Laserfiche experience:

- Client/Server
- Laserfiche API/Toolkit
- Quick Fields and Scripting
- WebLink/Public Portal
- EForms and Design
- Web Access
- Import Agent
- Workflow Scripting
- Scanning
- Laserfiche Mobile

Notable Development Experience:

- C#
- VB.NET
- ASP.NET
- ASP
- JavaScript
- VBScript
- HTML 5 and CSS3
- TSQL

Other Notable Experience:

- Microsoft Windows Server 2008, 2012
- Microsoft Office Suite 2005, 2007, 2010, 2013
- Microsoft SQL Server 2005, 2008, 2012, 2014
- Microsoft Visual Studio 2005-2013
- Checkmation
- Accent
- Digital Recorder
- Digital Camera Interface
- TeleForm
- UploadIt/File Uploader

Arsene Hanssens: Chief Technical Officer – Certified Laserfiche Professional

Arsene and his team are responsible for integration, customizations and software development. Arsene joined the CPS team in 2006 but has been working with CPS since 2001. Arsene has Electronic Content Management System (ECMS) programming experience since 1980. Arsene worked with the development of one of the very first document page scanners “Copiscan” which was then purchased by Bell & Howell in 1985.

Joseph Uyan: Support Engineer – **Certified Laserfiche Professional**

Joseph has over thirteen (13) years of Laserfiche experience, is specialist in legacy Laserfiche conversion, and client relations. Mr. Uyan spent the first three (3) years of his experience as a Laserfiche employee in the support department and the last seven (7) years with CPS. Joseph’s roles include customer service/technical support calls, large and small Laserfiche deployments, conducts specialized training courses, and project documentation.

Notable Laserfiche Experience:

- Client/Server
- Quick Fields
- Audit Trail
- Agenda Manager
- WebLink/Public Portal
- Mobile
- Web Access
- Import Agent
- Workflow and Design
- Scanning
- eForms and Design

Other Notable Experience:

- Microsoft Windows Server 2008, 2012
- Microsoft Office Suite 2005, 2007, 2010, 2013
- Microsoft SQL Server 2005, 2008, 2012, 2014
- Accent
- Cardiff TeleForm
- Complete OCR
- Checkmation
- Digital Recorder
- Digital Camera Interface
- ScanTuit
- UploadIt/File Uploader

Terrence Srey: Support Engineer – **Certified Laserfiche Professional**

Terrence has over ten (10) years of Laserfiche experience with the CPS team as a specialist in scanning processes, document intake, and is certified as a Laserfiche Professional. Mr. Srey handles customer service/technical support calls, large and small Laserfiche implementations, provides specialized training courses, quality assurance, and scanner maintenance.

Notable Laserfiche Experience:

- Client/Server
- Quick Fields
- Workflow and Design
- Scanning
- Mobile
- Web Access
- WebLink/Public Portal
- Audit Trail
- Import Agent
- eForms and Design

Other Notable Experience:

- Microsoft Windows Server 2008, 2012
- Microsoft Office Suite 2005, 2007, 2010, 2013
- Microsoft SQL Server 2005, 2008, 2012, 2014
- Checkmation
- Complete OCR
- UploadIt/File Uploader
- Digital Recorder
- Digital Camera Interface
- ScanTuit

2. Support and Maintenance

Laserfiche Software Assurance Plan (LSAP)

The proposed solution includes the Laserfiche Software Assurance Plan (LSAP) for one year with options for annual renewal. Customers with current LSAP are provided unlimited telephone technical support and software updates. Technical support (under the LSAP agreement) includes unlimited email, telephone and remote access to address problems related to system configuration or performance. While guaranteed response times are dictated by the terms of the support agreement, most support calls are taken live and resolved within a single call.

All support calls are logged in a case management system and assigned priority and severity levels that will be escalated (if necessary) to the development team and what lengths are necessary to address them such as providing hotfixes or point releases of the software. All customers with current LSAP are granted access to the Laserfiche Support Site where an abundance of knowledgebase documents can be used to support your internal IT team and Laserfiche users.

Note: Ninety-five (95) percent of support issues taken by our team have “*First Call*” resolution and are usually resolved within one hour.

a. Support Contact Information

- Support services are provided directly by CPS
- Our toll-free support number: 866-661-2425
- Non-emergency support calls can be directed to (support@cps247.com) or via our website (<http://www.cps247.com/Support/SubmitTicket.aspx>)

b. Basic Support Level

- Monday to Friday during normal business hours from 8:00AM to 5:00PM PST
- Next business day guaranteed response time

c. Priority Support Level

- Monday to Friday during normal business hours from 7:00AM to 6:00PM PST.
- 2 hours guaranteed response time
- Free remote upgrades
- Dedicated engineer

d. CPS VIP Support Level

To create the least amount of burden on the IT staff, and to optimize the benefits of your Laserfiche software we recommend our VIP support package. Our VIP program offers the followings:

- Monday to Friday during normal business hours from 7:00AM to 6:00PM PST.
- 2 hours guaranteed response time
- Free onsite upgrades
- A dedicated support engineer will serve as the primary contact for Laserfiche support through a direct telephone line.
- Unlimited onsite training
- Next day onsite support guaranteed if remote issue non-resolved
- Unlimited onsite support
- Preventive Maintenance: 2 on-site visits per year to ensure optimum system functionality
- Preferred pricing on specific integration and development projects
- Free enrollment to the Laserfiche Conference (unlimited access)
- No travel cost

3. Pricing Proposal

a. Laserfiche Avante

Description	Quantity	Public Price
Laserfiche Avante Server, incl. Workflow	1	\$5,000.00
Laserfiche Named users, incl. thin client, Email, Snapshot and Form Essentials	30	\$18,000.00
Laserfiche Public Portal Starter – 10 concurrent read only users	1	\$15,000.00
	Total Software	\$38,000.00

b. Professional Services

Description	Quantity	Public Price
Project Management	1	\$1,600.00
Installation and setup	1	\$1,600.00
Training: Admin Level I + End user (multiple classes)	2	\$3,200.00
Planning documents Import	1	\$1,600.00
Retention Schedules Implementation	2	\$3,200.00
	Total Professional Services	\$11,200.00

c. Laserfiche Support Services

Description	Quantity	Public Price
Laserfiche Avante Server	1	\$1,000.00
Laserfiche Named users	30	\$3,600.00
Laserfiche Public Portal Starter	1	\$3,000.00
Total Basic Support		\$7,600.00
Total Priority Support		\$11,400.00
CPS VIP Support		\$15,400.00

d. Turnkey Solution

Description	Quantity	Public Price
Software	1	\$38,000.00
Professional Services	1	\$11,200.00
Laserfiche Support – 1 st year Basic Support	1	\$7,600.00
Total		\$56,800.00
Special Discount		\$7,600.00
Total Turnkey Solution		\$49,200.00

4. Payment Terms

Description	%	Price
Order	50	\$24,600.00
Project completion	50	\$24,600.00

5. Optional Items

a. Additional Training Courses

System Administrator Level II: \$900.00

- Use advanced metadata design and functionality.
- Identify performance tuning best practices.
- Develop design and planning recommendations to meet unique requirements.
- Implement advanced troubleshooting and system optimization techniques.

Designing Forms: \$900.00

- Create and design web-based forms using the Forms Designer to capture information
- Build business processes using the Process Diagram to define how information should be routed, managed, and interacted with
- Utilize Forms reporting tools to analyze business processes and perform troubleshooting
- Administer Forms security, manage users and teams, and configure data sources

Business Process Automation for Forms: \$1,600.00

- Define a business process and determine the information that needs to be captured
- Utilize the Forms Designer to create a web-based form to collect information needed in the business process
- Build a business process using the Process Diagram to define how information should be routed, managed, and interacted with
- Create custom reports and use the built-in dashboards

Capture Workflow: \$900.00

- Connect document capture with business process automation.
- Rework and streamline existing processes from start to finish.
- Improving efficiency, accessibility, and accountability throughout the document management process.

Business Process Management/Workflow: \$1,600.00

- Diagram the steps of existing business processes.
- Use Laserfiche Workflow activities to turn current tasks into custom workflows.
- Create best practices for triggering workflows and run them efficiently.
- Use diagnostic tools to troubleshoot the Workflow system.
- Understand the basics building blocks of a workflow
- Work with commonly used workflow activities to handle repository automation, notifications, and document routing
- Design a workflow solution to address common business problems
- Troubleshoot common workflow problems

b. Additional Software

Description	Qty	Public Price	Basic Support	Priority Support	VIP Support
Laserfiche Starter Public Portal – 10 read only users	1	\$15,000.00	\$3,000.00	\$4,500.00	\$4,500.00
Import Agent	1	\$1,495.00	\$300.00	\$450.00	\$450.00
Quick Fields	1	\$595.00	\$120.00	\$179.00	\$179.00
Database Look UP	1	\$595.00	\$120.00	\$179.00	\$179.00

Project Schedule (draft)

Please see below matrix for each step of the project, including required (and optional) participants to the deployment of the project.

Based on our experience, we would expect the project to be fully completed within 4 to 5 weeks from the signed contract to going live.

X – Required
O - Optional

		Staff Required					
		Rec Mgr	LF Admins	IT	End Users	CPS PSG	CPS Dev
Kick Off Meeting							
1.0	Introduction to Laserfiche	X	X	X	O	X	
2.0	Software and Hardware Requirements		O	X		X	
3.0	Engineering and Building records Conversion (copy database and images)	X	O	X		X	
4.0	Define Repository requirements: Taxonomy and Indexing	X	X	O		X	
5.0	Schedule	X	X	X		X	
Conversion – Import Planning Documents							
1.0	Folder and Template structures	X	O	O		X	
2.0	Workflow design		O	O		X	X
3.0	Test		O	O		X	
4.0	Production	X	X	O		X	X
5.0	Fixes	X	X	O		X	X
Installation and Set Up							
1.0	Laserfiche Avante Server		O	O		X	
1.1	Laserfiche Avante Server Software						
1.2	Database and Volume (Data and Images)						
2.0	Laserfiche Workflow		O	O		X	
2.1	Laserfiche Workflow Server						
2.2	Database						
2.3	Laserfiche Workflow Designer						
3.0	Laserfiche WebAccess or Thin Clients		O	O		X	
4.0	Laserfiche Public Portal		O	X		X	
5.0	RME Set Up	X	O	O		X	
Training							
1.0	Administrator – Level I	O	X	X		X	
2.0	Administrator - Workflow	O	X	X		X	
3.0	End Users – Getting Started with Laserfiche	X	X	O	X	X	

4.0	End Users - Capture	X	X	O		X		
5.0	End Users – Capture Workflow & BPM	X	X	O		X		
6.0	RME							