8

SUBJECT: PIGGYBACK NATIONAL COOPERATIVE PURCHASING ALLIANCE (NCPA) RFP #36-22 – CONTRACT #01-158

BID #: PSC-0324-24 **OPEN DATE:**

GENERAL GOVERNMENT AWARDS COMMITTEE

KIND AND BASIS OF CONTRACT: PIGGYBACK CONTRACT- FROM DATE OF EXECUTED CONTRACT THROUGH NOVEMBER 30, 2025

AGENCY: JACKSONVILLE CITY COUNCIL

BASIS OF AWARD: PER PIGGYBACK CONTRACT

NUMBER OF BIDS INVITED: ( ) NUMBER RECEIVED: ( ) OTHER ( )

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to amend piggyback award to National Cooperative Purchasing Alliance (NCPA) contract #01-158 with Compulink Management Center, Inc. dba Laserfiche to include optional phase (Migration of OnBase) into the existing contract/agreement at no additional cost to the City. Period of service is from date of executed contract amendment through November 30, 2025. Total expenditure remains not to exceed $138,551.90.

Funding Source: 00111.221001.531090.000000.00000000.00000.0000000 - To be executed by formal contract amendment through the Office of General Counsel and processed via purchase order(s).

Attachments: Agency Memo, Vendor Letter, Previous Award

BUYER: OLIVE WALLACE-COHEN **RESPECTFULLY SUBMITTED** FOR: DUSTIN FREEMAN, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: Margret M. Sidman, Director/Council Secretary

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF GGAC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING _____ MEMBERS DISAPPROVING _____ DATE: _____

_____ _____ OTHER: _____

_____ _____

_____ _____

ACTION OF AWARDING AUTHORITY DATE _____

APPROVED _____ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

MARGARET M. "PEGGY" SIDMAN
Director/Council Secretary
Office (904) 255-5133
Fax (904) 255-5230
E-Mail: SIDMANP@COJ.NET

117 West Duval Street
City Hall, Suite 425
Jacksonville, FL 32202

March 1, 2024

MEMORANDUM

TO: Dustin Freeman
Procurement Division

FR: Margaret M. Sidman, Director / Council Secretary
Jacksonville City Council

RE: **Laserfiche, Single Source SOW Amendment Request FY 2024-2026**

City Council is requesting approval to include the optional phase (Migration of OnBase) into the proposal at no additional cost to the City.

The Jacksonville City Council (CC) requests approval to amend the Scope of Work contained in Bid# PSC-0324-24 awarded by the General Government Awards Committee on January 18, 2024. The result of this award was a Piggyback on the NCPA contract to purchase Laserfiche Software Solutions for document and records management for the Jacksonville City Council.

Upon amendment approval, a request for an amendment to the current draft contract will be made through the Office of General Counsel.

Funding Source: 00111.221001.531090.000000.00000000.00000.0000000

Your favorable consideration of our request is greatly appreciated.

Laserfiche®

City of Jacksonville

Laserfiche Project Proposal for Legislative Services

Laserfiche
February 29, 2024

Laserfiche

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Long Beach, CA 90807
800-985-8533 | 562-988-1688
www.laserfiche.com

Peggy Sidman
Director/Council Secretary
Jacksonville City Council
117 W. Duval Street, Suite 425
Jacksonville, FL 32202

Dear Peggy:

On behalf of the entire Laserfiche family, we are honored to submit the following proposal to the City of Jacksonville (Jacksonville) for your consideration as a partner to digitize and automate workflows withing your Legislative Services' Department. We are excited about the potential of working with you to support this initiative and believe our 35+ years of experience, solution capabilities and flexibility, financial stability and "crawl-walk-run" approach will ensure success. As we deliver value to the Legislative Services' Department we will be poised to help other departments within Jacksonville.

We would like to thank all the individuals at Jacksonville that have taken the time to meet with us, on numerous occasions, so we could develop a clear understanding of your current situation, challenges and desired goals. This proposal reflects our recommended approach based on the information we gathered from these meetings and will detail how we will help Jacksonville successfully achieve their ***business goals*** of ***Simplifying and Reducing Time spent searching for information for both Jacksonville employees and citizens while Improving Operational Efficiencies***. Based on the information we gathered from our discovery calls and onsite workshop, the following proposal will describe how our flexible platform will enable Jacksonville to meet its goals.

Thousands of Federal, State, County, and City government agencies have turned to Laserfiche throughout their digital transformation and process automation journey. Some turn to Laserfiche to enhance and improve upon what is already being done in this area, while others are looking to implement their first document management and automation solution. In all cases, they are focused on improving overall operational efficiencies while reducing costs. No matter where Jacksonville will be on its own journey, Laserfiche's partnership approach is there every step of the way.

We look forward to the possibility of closely working with you on this initiative and to help improve operational efficiencies across other departments of Jacksonville in a variety of use cases, in the future.

Warm regards,

Will Talbot
Manager, Enterprise Sales
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Company Background and Capabilities

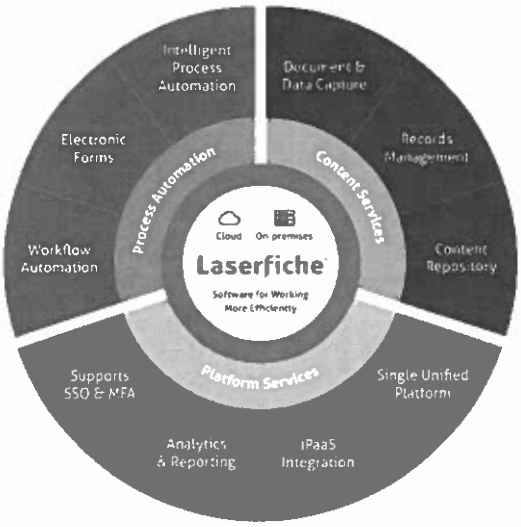
Compulink Management Center, Inc (DBA Laserfiche) ("**Laserfiche**") is a privately held company that has been helping organizations improve operational efficiency for over 36 years through its enterprise content services (ECS) platform. Through powerful workflows, process automation, electronic forms, intelligent analytics, and document/records management, organizations accelerate operations, optimize spend and drive business growth.

Laserfiche provides an industry-leading end-to-end process automation and enterprise content management platform that enables teams to work efficiently across departments. We're serving over 6 million users daily from more than 9,000 organizations across the globe, backed by the same ownership structure since we were founded in 1987.

All Laserfiche modules have been purposely built, entirely in house, to seamlessly work together and share the same UI experience and software architecture. Our solution empowers individuals, with no programing experience, the ability to design and build creative solutions to complex business problems that break patterns developed over years of doing things the way they have always been done. And all modules reside on a single unified platform.

The Laserfiche solution comprises of three pillars, **Process Automation, Content Services** and **Platform Services**.

Process Automation



Through process automation, Jacksonville can streamline day-to-day work by automating key workflows. With the Laserfiche solution, anyone can build easy-to-design automated workflows. Our no-code/low-code design and administrative interfaces will allow Jacksonville to expand and administer the solution without needing a full-time developer. Potential processes for digitization include:

- Finance: Accounts Payable, Invoicing and Vendor Management with automatic data extraction and workflows. And agreement storage/Lifecycle management with document management.
- Human Resources: Assist in Hiring, Employee Onboarding/Offboarding, Document Retention compliance.
- Legal and Compliance: Policy Management (IT, HR, Operations, Facilities), Approval process.

Content Services

Our intuitive Content Services functionality will enable Jacksonville to enhance and accelerate its digital transformation journey. By digitizing documents and data capture, employees can utilize our software for Contract & Signature Management, Compliance keeping and Documents & Records Management.

Platform Services

Through our single unified architecture, Jacksonville can scale at its own pace. Our solution is designed to easily integrate within your existing tech stack. Begin with your current needs and when ready, extent the Laserfiche solution across a variety of use cases in any Jacksonville department. With built-in analytics and reports, Jacksonville will have insights to key data to continuously optimize your processes.

Third Party Recognition

For years Laserfiche has received independent recognition from various analysts such as Gartner, Forrester, Nucleus Research and G2 for our intuitive user experience, product capabilities, integration options and deployment flexibility, and our customer support. As just one example, Laserfiche was named a **Leader in the Spring 2023 Grid for Enterprise Content Management.**

Laserfiche Forms (Task Management Interface)

The Laserfiche product suite offers a range of process automation and enterprise content management solutions, designed to enhance organizational efficiency. Among these tools, Laserfiche Forms offers a versatile and powerful option, empowering organizations to streamline processes and automate data collection. Forms along with our Workflow capabilities (described in the next section) will serve as the anchor for Jacksonville's solution. Some of the main functionalities and benefits of Forms include the following:

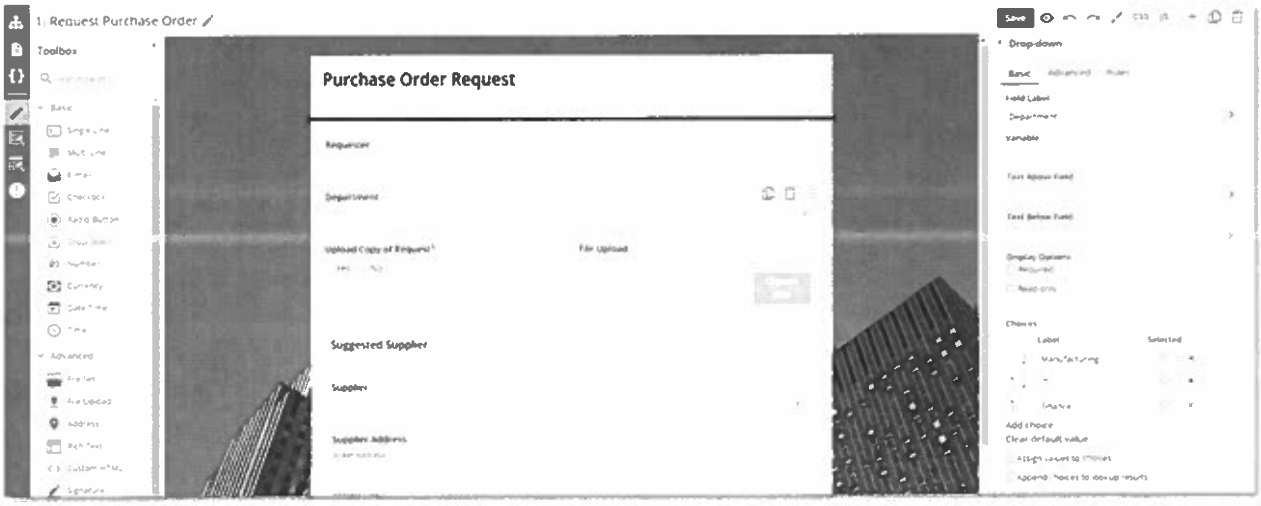


Figure 1: Example of Laserfiche's Drag & Drop Designer

Form Creation: With Laserfiche Forms, users can easily design customized digital user interfaces without requiring coding or technical expertise. The intuitive drag-and-drop designer allows for effortless addition of form fields, sections, and validation rules, ensuring accurate and structured data collection.

Database Lookups & Integrations: Laserfiche Forms also supports various field rules, database lookups, and seamless integration with third-party applications, enabling the smooth exchange of data. This ensures accurate and up-to-date information is integrated into the forms, enhancing data accuracy while minimizing data entry. Moreover, its seamless compatibility with Laserfiche Workflow allows for the automation of complex business processes, allowing content and metadata that are part of the process to be automatically stored, organized, and routed as needed.

Form Task Management: Laserfiche Forms automatically generates tasks based on predefined rules and conditions, assigning them to specific individuals or groups responsible for reviewing, approving, or completing relevant actions related to the process. This automated task management ensures efficient handling of submissions and expedites the decision-making process.

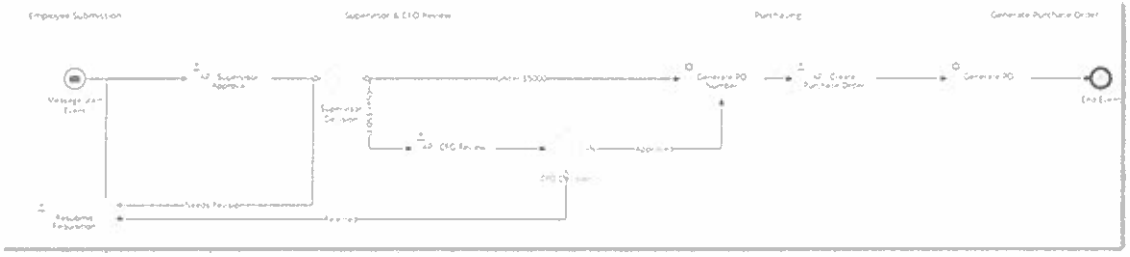


Figure 2: Laserfiche Process Flow Diagram Example

Task Tracking and Status Updates: The system offers real-time task tracking, enabling assignees to update task statuses, reassign tasks, provide comments, and approve/reject actions with ease. This level of visibility promotes effective collaboration, minimizes communication gaps, and facilitates smooth workflow progression.

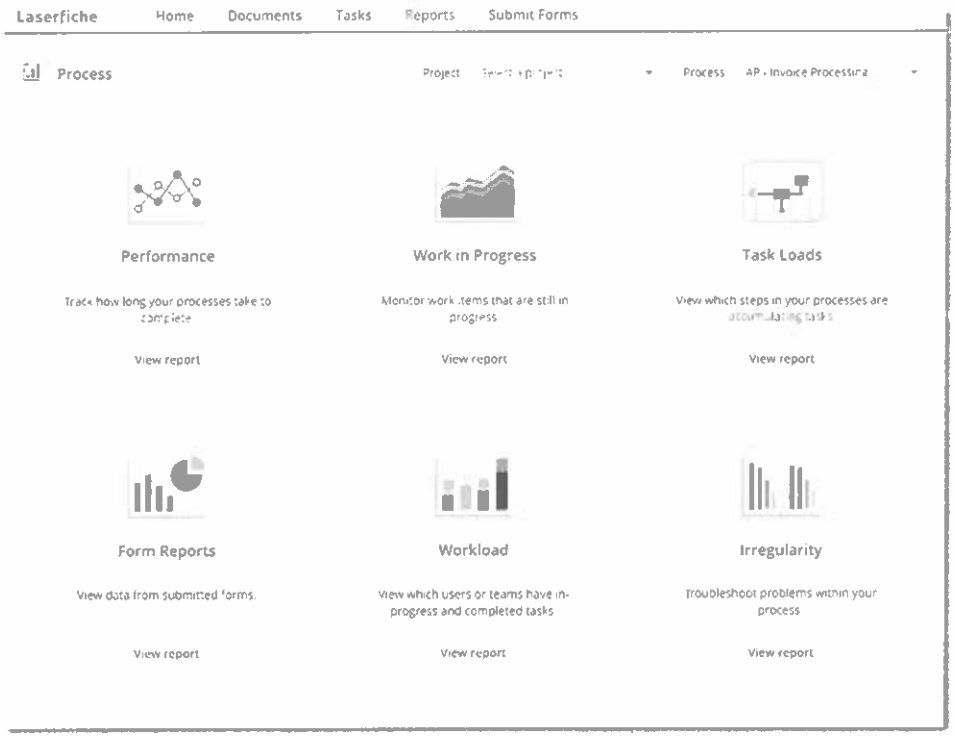


Figure 3: Out-of-the-box Laserfiche Form Reports

Task History and Reporting: Laserfiche Forms maintains a comprehensive history and audit of task activities, including task assignments, status updates, comments, and timestamps. This detailed record enhances transparency, accountability, and compliance with regulatory requirements. Additionally, the platform offers various reporting options, providing insights into in-progress tasks, workloads, and potential irregularities for example.

Laserfiche Workflow

Another valuable process automation tool within the Laserfiche suite is Laserfiche Workflow, which further optimizes business processes, reduces manual tasks, and boosts productivity. Key features and advantages of Laserfiche Workflow include the following:

Workflow Design: Laserfiche Workflow employs a visual, drag-and-drop interface to design complex workflows. Non-technical users can easily create and modify workflows by defining actions, conditions, and decision points, eliminating the need for coding expertise.

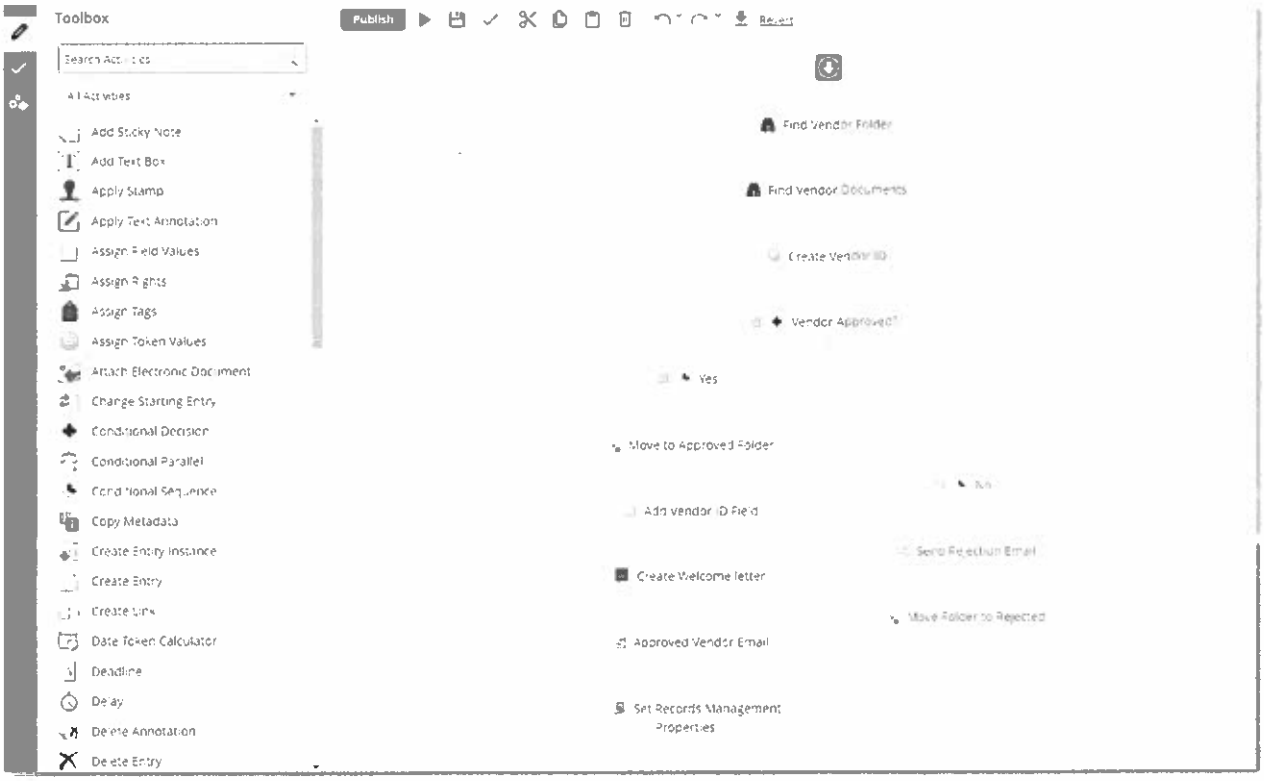


Figure 4: Example of Laserfiche Workflow's Drag & Drop Interface

Workflow Functions: This tool seamlessly integrates with other Laserfiche products, such as Forms, to automate various business processes. It can efficiently orchestrate business processes across applications, route related files, apply metadata, index content, and set records properties, among other functionalities. Automated triggers, based on predefined conditions like form submissions or content changes, reduce manual efforts, ensure consistency, and expedite process completion.

Integration and Connectivity: Laserfiche Workflow offers seamless integration with diverse systems, applications, and repositories, including Laserfiche ECM. This includes the ability to use options such as performing database queries, creating web request rules, performing API calls, and leveraging Laserfiche's SDK for example.

Analytics and Monitoring: Laserfiche Workflow provides valuable insights and monitoring capabilities to track workflow performance and efficiency. Users can analyze workflow data, identify bottlenecks or inefficiencies, and make data-driven improvements. Real-time monitoring and reporting enable organizations to gain visibility into ongoing processes and take proactive actions.

Laserfiche's powerful process automation tools such as Forms and Workflow allows any organization with various options and functions to streamline operations, enhance collaboration, and boost productivity across the board.

The Laserfiche Platform Components

The following table outlines the broader Laserfiche Platform. Laserfiche is the developer of award-winning Enterprise Content Management (ECM) software, packaged to meet the needs of an enterprise deployment. Laserfiche provides both Software as a Service (SaaS) and Self-Hosted licensing models, each making available various Laserfiche Components, as noted below:

Capabilities	Description
Laserfiche Server *(Self-Hosted Only)*	Core application and content server for Self-Hosted Laserfiche systems.
Laserfiche Process Automation (Workflow & Forms)	Automates content processing through the configuration of a drag-and-drop workflow designer, as well as enables the collection, routing and processing of information captured on an electronic form through the configuration of a drag-and-drop forms and business process designer.
Laserfiche Repository	Stores all Laserfiche content types in an organized folder hierarchy.
Laserfiche Web Client	Enables users to access the repository through all modern internet browsers.
Laserfiche Windows Client	Enables users to access the repository through an installed desktop application.
Laserfiche Mobile	Enables users to access the repository through a mobile application available on iOS, Android, and Windows devices.
Laserfiche Advanced Audit Trail	Tracks all attempted and failed events performed in the repository.
Laserfiche Records Management	Provides integrated, DoD 5015.2 certified records management functionality to keep track of documents through their complete records lifecycle, including cutoff and disposition actions.
Laserfiche Snapshot	Virtually prints content into the repository as a TIFF image, generates associated text for full-text searching, and allows for indexing upon import.
Laserfiche Quick Fields Complete	Provides automated capture and processing capabilities to content from a scanner, network drives, or content already in the repository. Processing capabilities include Real-Time Lookups, Barcode Reading, Pattern Matching, Zone OCR, Scripting, Document Classification, Auto-Annotations, and Optical Mark Recognition.
Laserfiche Quick Fields Agent	Enables the scheduling of Quick Fields sessions to run unattended.

Capabilities	Description
Laserfiche Import Agent	Monitors network folders, imports files into the Laserfiche repository, generates associated text for full-text searching, as well as automatically index and route documents based on the Window's file path or name.
Laserfiche Microsoft Office Integration	Allows for direct content import, as well as indexing capabilities, from a Laserfiche ribbon at the top of all Microsoft Office products. Within Outlook, emails and attachments can be imported to the repository and auto indexed with email properties, such as the to, from, subject, time received, etc.
Laserfiche Connector	Provides a non-programmatic means for integrating Laserfiche with a line of business applications to perform actions such as searching based on identified fields on a page, indexing content being scanned into the repository, kicking off Workflows, etc.
Laserfiche SharePoint Integration	Enables users to browse and search Laserfiche contents from SharePoint and send content from SharePoint to Laserfiche based on content type.
Laserfiche DocuSign Integration	Enables organizations to initiate a signing process with DocuSign from Laserfiche Web Client by choosing a document, DocuSign template, and who needs to sign it, then ultimately saving the executed document back into Laserfiche as a new version.
Laserfiche SDK	Includes access to the same Web Services, APIs, and libraries used to develop the Laserfiche applications.
Laserfiche Public Portal	Allows concurrent, read-only connections to allocated areas of the Laserfiche repository to be accessed by unauthenticated (public) users.
Laserfiche Forms Portal	Allows form submissions from unauthenticated (public) users.

Laserfiche Cloud Business Tier Package

Laserfiche Cloud introduces a straightforward annual fee including software licenses, hosting and storage in Amazon Web Services (AWS), technical support, and quarterly software update deployments to incorporate the latest features and performance enhancements.

User License Types

The following user license types are available to solve an organization's needs and will determine their core investment. Please refer to the Cost section below for the Jacksonville Cost build-up.

License Types	
Full User	Provides the entire array of Laserfiche feature functionality in one user type with read/write repository access and the ability to participate in, create, and administer Forms processes.
Participant Users	Limited, authenticated access to Laserfiche for employees. Participant User licenses provide the ability to participate in forms processes (submit, review, approve, etc.) and have read-only access to the repository.
Community Users	Limited, authenticated access to Laserfiche for non-employees. Community User licenses provide the ability to participate in forms processes (submit, review, approve, etc.) and access the repository in a read-only fashion.

Laserfiche Cloud – Business Users

Each Cloud – Business User bundles the following components:

- 100GB Storage Per User*
- Web, Windows and Mobile Clients
- Advanced Audit Trail
- Records Management
- Snapshot
- Import Agent
- Microsoft Office Integration
- Microsoft Teams Integration
- Process Automation (Workflow and Forms)
- Connector
- DocuSign Integration

*Storage Per User is pooled across the account.

The following are also included across the Laserfiche Cloud – Business Tier configuration:

- 1 Repository
- 10 Instances of Quick Fields Complete
- 10 Instances of Quick Fields Agent
- Laserfiche APIs – 100,000 calls/month
- SDK
- Unlimited Public Portal
- Unlimited Forms Portal

Software License Cost Component

Product Description	Quantity	Retail Unit Price	Discounted Unit Price	Annual Retail Total	First Year Annual Discounted Total
Laserfiche Business User	25	$950.00	$920.55	$23,750.00	$23,013.75
Public Portal*	7,000	$0	$0	Included	Included
			Total 1st Year Software License Cost:	**$23,750.00**	**$23,013.75**

**Note:*

- *No Authentication of Non-Business Users*
- *Documents deemed accessible through the Portal will be accessible to the Public*

One-Time Implementation - Statement of Work (SOW)

This Statement of Work ("**SOW**") dated effective _____, 2023 ("**Effective Date**") defines the professional services ("**Services**") that Compulink Management Center, Inc. dba Laserfiche ("**Laserfiche**") will provide for the City of Jacksonville, Florida ("**Customer**" or "**City**") in conjunction with the Enterprise Content Management System Project ("**Project**"). The SOW will be made a part of the Laserfiche Services Agreement between Laserfiche and Customer dated effective as of _____, 2023 (the "**Agreement**"). In the event of any conflict or inconsistency between the SOW and any terms or conditions set forth in the Agreement or other document relating to the transactions contemplated by the Agreement, the terms and conditions set forth in the SOW will prevail.

Project Scope and Objective

City seeks to implement a robust document and records management solution. The solution implementation will include system configuration and training of City personnel, as well as an integration with the City's Granicus line of business applications.

The high-level objectives include:

- Implementing a robust, commercial-off-the-shelf, enterprise content management system with extensive document management, metadata management, and records management capabilities.
- Implementing a user-friendly interface with flexible search capabilities for internal and public users to easily locate stored documents/data.
- Implementing streamlined document capture, version control, role-based permissions management, and advanced reporting and auditing capabilities.
- Implementing integration and workflow capabilities to support document OCR, data extraction, routing, indexing, filing, and reporting across their organization.

To this end, Laserfiche will provide a centralized content repository with robust integration capabilities, user-friendly web-based interfaces, and extensive business process automation capabilities through workflow and electronic forms as part of the fully implemented project.

This estimate provides the scope of work, level of effort, and pricing for the project implementation based on information provided as part of this pricing proposal.

Project Structure

Laserfiche will use Phases to drive the development of this project. Phases focus on large objectives and problems identified at the beginning of the project and may sometimes run in parallel. Phases and

the solutions proposed may be updated throughout the course of the project, with no formal scope change needed unless the estimated project effort increases. If the estimated effort does increase, a change request will be needed to set a new budget. Aside from that, there is trust that the Laserfiche engineers and the Customer team working on the project will know how to best use their efforts to deliver a quality solution. Laserfiche anticipates a cooperative learning relationship with Customer throughout the project in which Customer will be actively involved throughout all Phases.

Identified Phases

The following Phases (major project areas) are included in the Services. Phases will run in parallel where possible.

Phase	Description
Requirements Gathering	**Core Activities Include:** Work with Customer Business Analysts to: • Define taxonomies, metadata, user access, retention schedules, and other repository infrastructure that will support subsequent work. • Assess and document capture and routing processes. • Assess and document the integration and public portal requirements. • Plan training topics for the system administrators and trainers. • Create Requirements Document and define acceptance criteria for the solution. **Deliverables/Acceptance Criteria:** • Project Plan. • Requirements Document. **Assumptions and Constraints:** • The Requirements document produced during this phase will be an export of all documented features in Azure DevOps. Features or additional items added following this phase to Azure DevOps may require a Project Scope Change Request and could affect project scheduling.
Infrastructure and Authentication	**Core Activities Include:** • Create Laserfiche Cloud account(s). • Work with Customer IT to configure Microsoft ADFS for application authentication. • Perform initial security and access configuration for infrastructure and applications. **Deliverables/Acceptance Criteria:** • Laserfiche Cloud account(s) available to Customer. **Assumptions Driving Effort:**

Phase	Description
	• Customer is utilizing a ADFS Identity Provider for all environments and all users will authenticate to Laserfiche using accounts on that domain. Additional identity providers will be scoped out separately. • Customer will establish any trust relationships between the Customer and Laserfiche domains necessary for Laserfiche to authenticate login requests against Customer Domain Controllers. • Customer will provide Windows machines and/or servers for the installation of Laserfiche Import Agent, Laserfiche Quick Fields, and/or a remote agent as deemed necessary for the implementation.
System Implementation	**Core Activities Include:** Create and configure an intuitive Laserfiche repository for Customer, which includes: • Configuring user and group security access to applications. • Implementing granular user and group access and security configurations for documents, folders and metadata based on pre-defined criteria. • Configuring hierarchical folder structure to support document storage, searching, and records retention. • Configuring templates, indexing fields, records retention, and naming document convention. • Configuring Laserfiche Workflows to rename, index, and route incoming documents to appropriate folders in repository based on metadata fields. • Configuring the Laserfiche public portal to allow public users to search and view documents marked as publicly accessible. • Configuring exception routing for documents with processing errors. **Deliverables/Acceptance Criteria:** • Laserfiche repository deployed and ready for user acceptance testing (UAT). **Assumptions and Constraints:** • Laserfiche will implement up to 5 security roles within the solution. Laserfiche will train Customer on how to add additional security groups. • Customer will have no more than 20 document types and associated field templates for this implementation. Laserfiche defines a document type as a document requiring its own set of metadata fields (template). Laserfiche will configure up to 10 metadata fields for each template. • Customer will have no more than 20 record series. Laserfiche defines a Record Series as a combination of a retention schedule, cutoff, and disposition action. Ex: "Retain 5 years after the End of the Fiscal Year, then Destroy". • Customer will provide information on desired exception handling (e.g., how to index and route documents missing required information).

Phase	Description
Document Capture	**Core Activities include:** Design and configure workflows to support document capture and approval, which includes: • Configuring out of the box import options for users, including scanning, drag-and-drop, and the Microsoft Office integration. • Configuring Import Agent to monitor a network folder and import documents automatically. • Configuring a process to capture indexing fields and route documents for manual proofing and approval upon import. Approvers will have the option to send the document back to the scanning team for modifications. • Configuring a process to mark select documents as publicly available following proofing and approval. • Configuring a process to inherit metadata from the parent folder upon document import if the document is imported into a folder other than the Incoming Documents folder. • Configuring Laserfiche Quick Fields, Capture Profiles and/or Workflow to automatically identify, split, extract data, and index standard format document types. • Implementing automatic database lookups to populate indexing fields based on entry or extraction of unique identifiers (as possible). **Deliverables:** • Laserfiche business process automation deployed and ready for user acceptance testing (UAT). **Assumptions and Constraints:** • Laserfiche will configure approval tasks for up to 2 sequential or parallel approvers. • Laserfiche will configure automatic identification and metadata extraction for up to 5 document types. • Scanning with automatic identification and data extraction depends on a standard format. • Laserfiche will auto-index documents using text and/or barcodes found on the document image. Laserfiche's ability to extract data from document images will be dependent on image quality. Increased image quality will result in more accurate data extraction. • All fields extracted across document types will be in the same format (e.g., All Employee IDs begin with a letter and are followed by six numeric characters). • Laserfiche will attempt to perform handwriting recognition on documents with handwriting, but this must be configured as part of a capture profile.

Phase	Description
	• Laserfiche will not be able to process documents where the underlying text is obscured by table or column lines. • Documents will be scanned at an acceptable quality for the OCR process to function optimally (typically at least 300dpi). • Non-standard formats may need to be manually indexed. Laserfiche will work with Customer to automate as much of the scanning process as possible.

Integrations	**Core Activities include:**
	Design and configure integrations to support configured business processes, which includes:
	• Configuring API, web service calls, or database lookups to support integrations with the following applications:
	  o Granicus Legistar
	  o Public Notice
	• Integrations will pull uploaded documents and associated metadata from the Granicus applications into Laserfiche.
	Deliverables:
	• Laserfiche integrations deployed and ready for user acceptance testing (UAT).
	Assumptions and Constraints:
	• Laserfiche will configure up to 5 API or web service calls as part of this project.
	• Laserfiche will configure up to 5 database lookups as part of this project.
	• Applications for integration will allow for direct database lookups or provide an API or web service endpoint that Laserfiche can use for the integration. If this is not available, Laserfiche will look at additional options such as a custom SDK integration. A custom integration will be scoped out separately as more information is needed. Typically, a custom integration will fall within the range of 60-80 development hours.
	• Customer will be responsible for all licensing fees pertaining to applications integrated into Laserfiche.
	• Integrations will be run using a service account with the appropriate Laserfiche access and will not need to pass individual user credentials.

Migration from Onbase	**Core Activities Include:** • Prepare migration strategy from Hyland Onbase and define optimal migration methods. • Build migration utility to support migration of documents and data from Onbase to Laserfiche.

Phase	Description
	• Run test migrations to copy documents and metadata from Onbase to Laserfiche. • Run final Onbase migrations, to the Laserfiche Production environment. **Deliverables/Acceptance Criteria:** • Content from Onbase migrated to Laserfiche and checked by both Laserfiche and Customer for completeness and integrity. • A Migration Report to record correctly migrated documents, note any unhandled exceptions that led to un-migrated or changed data, and suggest any remediation steps the Customer team can take. **Assumptions and Constraints:** • Laserfiche will migrate up to 10,000 legislative documents to Laserfiche. • There are no more than 5 document types in Onbase. • Customer will provide expertise on how to bulk export documents from their OnBase system. • File types will remain in their original format as provided to Laserfiche from Onbase. • All files are in standardized and non-proprietary formats. Any metadata is stored in an ODBC-compatible relational data source, such as SQL Server. • There are no document versions or annotations to be migrated from Onbase. • OCR data for documents in Onbase will not be migrated. Laserfiche will OCR documents in Laserfiche after they are migrated from Onbase. • No security access rights that may exist in Onbase will be migrated with the documents into Laserfiche. Security will be applied in Laserfiche post-migration. • Customer will be responsible for any final data clean up suggested in the Migration Report necessary to address migration exceptions due to data not meeting previously communicated and documented assumptions and expectations. • Data migration is specific to documents held in the Onbase repository. Processes and workflows will not be migrated into Laserfiche other than those defined in this SOW. Migrated data is inactive and will not be migrated into active business processes.
Training, Knowledge Transfer, and Documentation	**Core Activities Include:** Train Customer users and administrators as well as Laserfiche Support on the solution developed and how to manage and support it, which includes: • Provide up to 4 hours of onsite training to Customer power-users and administrators on how to use and implement the solution.

Phase	Description
	• Provide up to 6 hours of onsite training to Customer administrators on how to maintain the system. **Deliverables:** • Recorded training sessions (either remote or in-person) for Customer power-users, administrators, Customer Stakeholders, and Laserfiche Support on the new Laserfiche solution for post-project support. • Customer instructed on how to access Laserfiche administration documentation. • End-user manual for solution specific features. **Assumptions Driving Effort:** • Customer will be available to provide any assistance Laserfiche may need for end user trainings.
User Acceptance Testing	**Core Activities Include:** • Work with Customer to develop user acceptance test scripts that map to the defined acceptance criteria. • Testing by Customer end-users using the test scripts. • Remediate issues discovered during Customer until acceptance criteria are satisfied. • Work with Customer to complete integration testing. **Deliverables:** • Solution deployed in Test, approved by Customer for promotion to Production. **Assumptions Driving Effort:** • Customer personnel will be available for UAT per a mutually agreed-upon schedule. • Customer will be responsible for creation of the test scripts. Laserfiche will provide high-level test cases for the solution. • New features/acceptance criteria not listed in the requirements document are subject to a change order at Laserfiche's discretion. • Laserfiche will work to resolve any known critical issues prior to Go-Live. Laserfiche will document and work to address any non-critical issues prior to Go-Live, but such non-critical issues shall not delay Go-Live. Laserfiche defines Critical issues as issues within the Laserfiche system that prevent or significantly impede a user from performing their required tasks in Laserfiche.
Go-Live and Post-Production Support	**Core Activities Include:** • Prepare for system Go-Live. • Promote solution to Production.

Phase	Description
	• Remediate any issues within scope, as necessary. **Deliverables:** • Laserfiche solution deployed in Production and ready for end-users. **Assumptions Driving Effort:** • Customer shares responsibility for smoke testing the solution before and after Production deployment. • The Laserfiche project team will continue to support the solution for four (4) weeks while transitioning support responsibilities to the Laserfiche Direct Support Team.

Customer Responsibilities

The following are Customer responsibilities for the Services.

Customer's signee must initial each item to provide their acknowledgement.

1. ____Customer will make available, and provide access to, necessary personnel for project success within three business days, including:
   a. A designated project manager, IT personnel, subject matter specialists, and personnel for project participation. Delays may result in modifications to Laserfiche staffing allocations, placing the project on hold, or the project incurring additional hours and fees.
   b. Personnel to aid in issue resolution and/or requirements clarification. Any delays in issue resolution or requirements clarification may result in modifications to Laserfiche staffing allocations, placing the project on hold, or the project incurring additional hours and fees.
   c. Personnel to test system functionality. Any delays in solution testing and feedback may result in modifications to Laserfiche staffing allocations, or the project incurring additional hours and fees.
2. ____Customer will work with Laserfiche to provide any necessary technical resources and support. This includes:
   a. Providing any access to the Customer environment that the Laserfiche team will need to develop.
   b. Providing requested documentation and acceptance of key deliverables within 3 business days. If Customer does not respond in writing to Laserfiche's request for acceptance within five business days of Laserfiche's request, or Customer does not reasonably refuse such approval within the five-day period, Customer will be deemed to have accepted.
3. ____Customer will be responsible for providing all IT infrastructure resources and licensing all software components necessary for completing Services. This includes:
   a. Windows Server (2016 or higher) and Microsoft SQL Server Standard/Enterprise (2016 or higher) licenses, SSL certificates for all servers that require them.
   b. Licenses for all other software and systems with which the Laserfiche system will integrate.

Laserfiche Responsibilities

The following are Laserfiche responsibilities for the Services.

Laserfiche's signee must initial each item to provide their acknowledgement.

1. ____ Laserfiche will make available, and provide access to, necessary personnel for project success within three business days, including:
   a. A designated project manager to help schedule meetings, facilitate project governance, coordinate document requests, and other tasks.
   b. Laserfiche engineering personnel.
2. ____Laserfiche will work with Customer to provide any necessary technical resources and support. This includes escalating issues to Laserfiche Support and Laserfiche Development, as necessary.

Project Assumptions

Customer's signee must initial each item to provide their acknowledgement.

1. ____The Services described in this SOW encompass the scope of this Project. Any additional changes or scope requests should be provided in a separate SOW or Change Request. For clarity, the Services herein will focus exclusively on Laserfiche software, including its system and solution, except where explicitly noted in this SOW.
2. ____If after Laserfiche requests a statement of acceptance on Project closeout, Customer does not provide written acceptance or a reasonable explanation of a denial within five business days, Customer will be deemed to have accepted.
3. ____All Laserfiche Software is subject to the terms and conditions of the underlying Purchase Order, Cloud Subscription Agreement, and/or Laserfiche End User License Agreement, as applicable. By accepting this Statement of Work, Customer accepts the terms and conditions therein.
4. ____The Laserfiche and Customer project teams will utilize Laserfiche's tools (i.e., Azure DevOps) to track in-scope solution functionality, development progress and testing.

Professional Services Pricing

The table below represents the level of effort required for this project, including both onsite and offsite Services work. This is a time and material project. Reasonable out-of-pocket expenses (e.g., airfare, lodging, meals, and ground transportation) will be billed as incurred and will not exceed 15% of Services fees.

Phase	Description	Hourly Rate	Est. Hours	Est. Cost	Discounted Cost
1	Requirements Gathering	$225.00	25	$5,625.00	$5,450.75
2	Infrastructure and Authentication	$225.00	10	$2,250.00	$2,180.30
3	System Implementation	$225.00	30	$6,750.00	$6,540.90
4	Document Capture	$225.00	25	$5,625.00	$5,450.75
5	Integrations	$225.00	35	$7,875.00	$7,631.05
6	Migration from OnBase	$225.00	35	$7,875.00	$7,631.05
7	Training, Knowledge Transfer, & Documentation	$225.00	20	$4,500.00	$4,360.60
8	User Acceptance Testing	$225.00	35	$7,875.00	$7,631.05
9	Go-Live and Post-Production Support	$225.00	20	$4,500.00	$4,360.60
		Total	**235**	**$52,875.00**	**$51,237.05**

Payment Plan

All Services will be performed in accordance with this mutually accepted SOW. 100% of Services fees will be due October 1, 2024. Invoices are due upon receipt. Changes to project scope or effort required to complete specific work items due to unforeseen complications or issues outside of Laserfiche's control will go through a formal change order process with Customer.

Statement of Work Approval

IN WITNESS WHEREOF, the parties hereto have caused this Statement of Work to be executed by their duly authorized representatives as of the Effective Date.

Customer Approval (one signee required)			
Signature	Name	Title	Date

Laserfiche Approval (one signee required)			
Signature	Name	Title	Date

Warranty

Since we are proposing a SaaS solution, there is no Warranty. However:

1. *We provide a Service Legal Agreement ("SLA") that provides Service Credits to Subscriber if we don't meet certain uptime percentages (See Section 10.2 of Cloud Subscription Agreement, and SLA); and*
2. *We will indemnify Subscriber for any IP infringement claims brought by a third party that our software infringes any third-party software (See Section 9 of Cloud Subscription Agreement).*
3. *Should Jacksonville desire a self-hosted solution, we do have a self-hosted version of our software that comes with a warranty and break-fix support.*

- What is the (average) frequency of new releases and upgrades?
  - *Updates are made quarterly. Patches or hotfixes are deployed as needed.*
- How does the installation of software upgrades affect software operation?
  - *Updates to our SaaS platform are pushed automatically with minimal downtime.*
- What is your support policy on older software releases?
  - *Updates are pushed automatically with our proposed SaaS offering.*
- List any planned enhancements with planned release dates.
  - *Please see the Confidential Laserfiche Roadmap attached.*
- Is any customization automatically included in any upgrades?
  - *This question may require additional clarity as to what kind of customization is needed. Our SaaS platform is designed so that customizable components and configurations upgrade smoothly.*
- Does customization incur additional annual maintenance costs?
  - *No*

Ownership/Intellectual Property Rights

- Describe whether proposed solution requires custom software development, "pre-packaged" proprietary software, or a combination of the foregoing.
  - *Pre-packaged software with no-code/low-code interfaces for designing and configuring processes.*
- If proposed solution requires custom web development, will Jacksonville full ownership of the resulting software (and its source code) be qualified or restricted in any way?
  - *We propose implementing with our proprietary, commercial off-the-shelf software. This will allow process development to occur much faster while maintaining a high degree of flexibility and limiting the technical debt of a custom solution.*
- If proposed solution requires "pre-packaged" proprietary software, will Jacksonville be required to license that software?
  - *Yes, Laserfiche software will need to be licensed as detailed in the cost summary. At this time, we do not have a good understanding of project scope, such as what processes will be developed and integrations to be made.*

Implementation Support

Laserfiche account support is a collaborative effort among our team of consultants, customer success managers, and support engineers who specialize in troubleshooting issues related to Laserfiche core products. Their time is dedicated to address support issues in a timely manner, and they are not distracted by ongoing projects.

Jacksonville personnel designated as support liaisons will be introduced to their Laserfiche support team during implementation. Toward the end of the implementation project, following 4 weeks of post-production support, the Laserfiche project team will conduct a knowledge transfer session to verify the Jacksonville support teams are familiar with Laserfiche solution and can effectively troubleshoot any minor issues that may arise and identify when issues require escalation to the Laserfiche support team.

If the Laserfiche Support team is needed, the Jacksonville support liaisons may use the following process:

Support process flow:

- Jacksonville emails the dedicated Laserfiche Support team.
- A helpdesk support ticket is opened in our internal support application, Zendesk.
- A support team representative will coordinate a troubleshooting call or screenshare session directly with the Jacksonville support liaison.
- Communication and troubleshooting sessions are logged in the support ticket from initial contact through to issue resolution.
- Issue escalations or feature requests may be taken directly to the Laserfiche Developers as necessary.

Escalation

There are various escalation procedures available to Jacksonville, contingent on what the problem is. During a project, if there are issues related to project management or development efforts, escalations are handled by the Laserfiche Program Management team. For core product technical support, issues can be escalated to Laserfiche Support. For general escalations, Jacksonville can reach out to the assigned account management team, consisting of an account manager and customers success manager.

Laserfiche Software Support Plan

For post-project support, Laserfiche Direct Support engineers are available 24/5 Globally, Monday through Friday, except on designated US holidays. A Zendesk ticket is the preferred method for requesting support, but Support engineers can also triage cases using e-mail or phone. The standard response time for the Laserfiche Software Support Plan is 4 hours.

Laserfiche is currently working towards implementing 24/7 Globally.

Support includes all updates, access to online support resources, and a 4-hour response time with Laserfiche Helpdesk. Support is included with the proposed subscription licensing packages.

Additional Support Channels

Aspire

Laserfiche's e-learning platform with on-demand learning resources and Laserfiche certification courses. laserfiche.com/learn-support/aspire/

Laserfiche Answers

Online community for discussions about anything related to Laserfiche. answers.laserfiche.com/

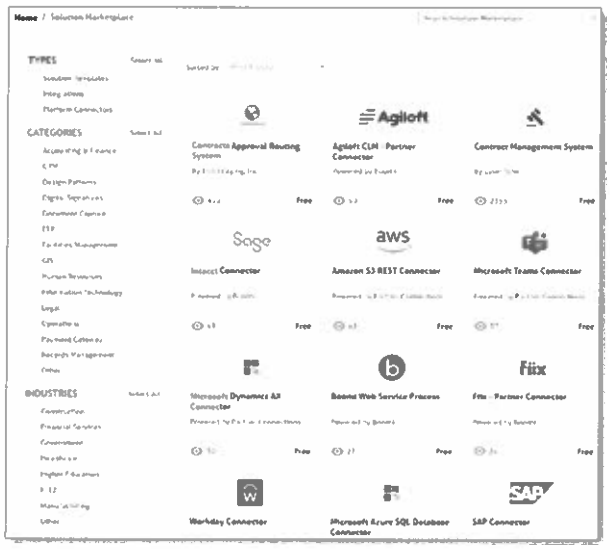
Laserfiche Support

One-stop shop for Laserfiche support and learning resources, including access to technical white papers. support.laserfiche.com

Solution Marketplace

Access use-case templates to accelerate deployment of automated processes.

- Prebuilt Laserfiche solutions for hundreds of use cases
- Curated list of processes created by Laserfiche staff and users!



Total Project Cost Summary

Laserfiche pricing consists of two components, the Annual User Subscription Fee and a One-Time Implementation Fee. Based on Jacksonville's needs, here is the Cost Summary including all components for Year 1, 2 and 3.

Product Description	Quantity	Retail Unit Price	Discounted Unit Price	Annual Retail Total	First Year Annual Discounted Total
Laserfiche Business User	25	$950.00	$920.55	$23,750.00	$23,013.75
1-Test Environment*	6 Users			$5,510.00	$1,440.00
One-time Implementation Fee	235	$225.00	$218.03	$52,875.00	$51,237.05
80-VIP Hours				$14,400.00	$13,953.60
1-Public Portal*	Unlimited Users	$0	$0	Included	Included
		Total 1st Year Cost:		**$96,535.00**	**$89,644.40**
				Total Savings:	$6,890.60
		Total Yr. 2 Annual Discounted Total:			**$24,453.75**
		Total Yr. 3 Annual Discounted Total:			**$24,453.75**

**Notes:*

- *No Authentication of Non-Business Users on Public Portal*
- *Documents deemed accessible through the Portal will be accessible to the Public*
- *1 Test Environment will be accessible for 6 Business Users*

PAYMENT TERMS

- *Software License Fees ($24,453.75) will be billed and are due upon execution of the Agreement.*
- *100% of Services fees ($65,190.65) will be due October 1, 2024.*
- *Invoices are due upon receipt.*

SUBJECT: PIGGYBACK NATIONAL COOPERATIVE PURCHASING ALLIANCE (NCPA) RFP #36-22 – CONTRACT #01-158

BID #: PSC-0324-24 **OPEN DATE:**

GENERAL GOVERNMENT AWARDS COMMITTEE

KIND AND BASIS OF CONTRACT: PIGGYBACK CONTRACT- FROM DATE OF EXECUTED CONTRACT THROUGH NOVEMBER 30, 2025

AGENCY: JACKSONVILLE CITY COUNCIL

BASIS OF AWARD: PER PIGGYBACK CONTRACT

NUMBER OF BIDS INVITED: ( ) NUMBER RECEIVED: ( ) OTHER ( )

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to piggyback National Cooperative Purchasing Alliance (NCPA) contract #01-158 with Compulink Management Center, Inc. dba Laserfiche for the purchase of Laserfiche Software Solutions for Document and Records Management for the Jacksonville City Council. Period of service is from date of executed contract through November 30, 2025. Total expenditure not to exceed $138,551.90 with cost allocated as follows:

- Year 1 – Software licenses Fee $24,453.75 in FY 24
- Year 2 – One-Time implementation cost plus license fee - $89,644.40 in FY25
- Year 3 – Software license fee - $24,453.75 in FY26

Funding Source: 00111.221001.531090.000000.00000000.00000.0000000 - To be executed by formal contract through the Office of General Counsel.

Attachments: Agency Memo, Contract #01-158, Vendor Quote, Certificate of Insurance

BUYER: O. Wallace-Cohen **RESPECTFULLY SUBMITTED**
OLIVE WALLACE-COHEN
DUSTIN FREEMAN, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: **Margret M. Sidman, Director/Council Secretary**

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF GGAC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 3 MEMBERS DISAPPROVING 0 DATE: 1/18/2024

OTHER:

ACTION OF AWARDING AUTHORITY DATE 1/22/2024

APPROVED ✓ DISAPPROVED

OTHER

Karen Bowling
Chief Administrative Officer
~~For: Mayor Donna Deegan~~
Under Authority Of:
Executive Order No: 2023-02

SIGNATURE OF AUTHENTICATION Karen Bowling