

Laserfiche[®]
Run Smarter[®]

LASERFICHE AVANTE ON-PREMISE PROPOSAL

City of National City



BY COMPLETE PAPERLES SOLUTIONS - ANAHEIM, CALIFORNIA

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Letter of Transmittal

March 29th 2023

City of National City
1243 National City Blvd
National City, CA 91950

Dear Shelley,

We are pleased to submit the attached proposal for the Laserfiche Avante On-Premise Solution with 15 Named Users with Starter Public Portal. Complete Paperless Solutions, LLC (CPS), located in Anaheim, is a **Platinum Certified Solution Provider** (SP) of the award-winning Laserfiche™ Enterprise Content Management solution as well as a respected systems integrator and consultancy.

CPS helps Local Agencies like the City of National City to meet the challenge of providing a greater transparency by making information publicly accessible and streamlining public records request with DoD 5015.2 -certified records management and Trusted Systems while simultaneously 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,

Jamie Dunn
Vice President of Sales

Table of Contents

- Letter of Transmittal 1**
- 1. Company Profile 3**
 - a. Organization Chart.....4
 - b. Project Team.....4
- 2. Support and Maintenance..... 10**
 - a. Support Contact Information..... 10
 - b. Basic Support Level 10
 - c. Priority Support Level 10
 - d. CPS VIP Support Level..... 11
- 3. Questys to Laserfiche Conversion 11**
 - a. Document Conversion 11
 - b. Audit Report 11
- 4. Pricing Proposal 12**
 - a. Laserfiche Avante 12
 - b. Professional Services 13
 - c. Laserfiche support services..... 13
 - d. Optional Pricing for Support..... 13
 - e. Turnkey Solution..... 13
- 5. Payment Terms 14**
- 6. Acceptance..... 14**

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, CUG, CLEARs, CLETS and CCAC.**

With over 100 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.

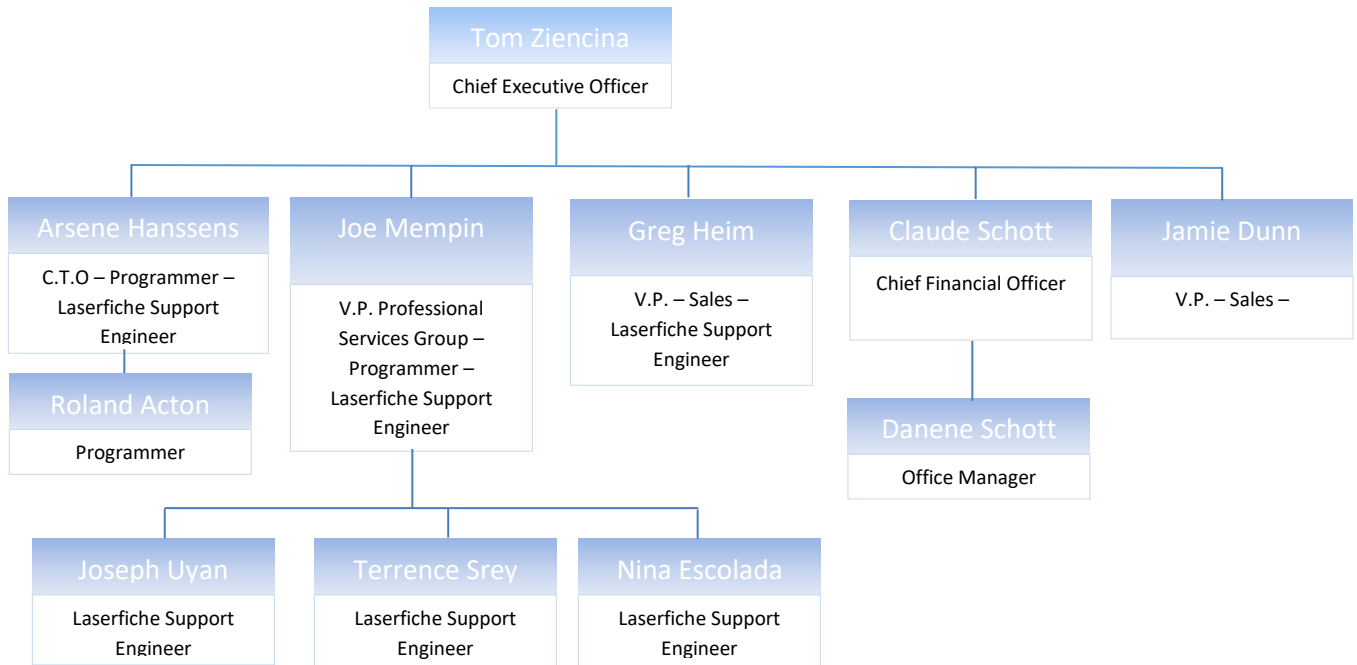
A representative sampling of some of our customers would include the Cities of Bakersfield, Big Bear, Chowchilla, Coachella, Claremont, Ceres, Cerritos, Commerce, Covina, El Centro, El Monte, El Segundo, Encinitas, Fontana, Fountain Valley, Gilroy, Grand Terrace, Huntington Beach, La Habra Heights, Irwindale, La Quinta, Lodi, Menifee, Montclair, Montebello, Murrieta, Pismo Beach, Porterville, Rancho Mirage, Redondo Beach, Rosemead, San Bernardino, San Jacinto, San Rafael, Santa Clarita, Seal Beach, Taft, Torrance, West Covina, 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 National City 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 National City and CPS will be the essence of a successful implementation. Therefore, **Jamie Dunn** will be the executive coordinator and main contact. Prior to joining CPS, Jamie was an Account Manager of a different Laserfiche Value Added Reseller (VAR).

CPS' Professional Services team lead by **Joseph Mempin** will assist the City of National City in the implementation of the Laserfiche Avante or Cloud. Resumes to follow...



SUMMARY

Manages a professional services team which executes the technical responsibilities of the company. Responsibilities include project management, project deployment, obtaining requirements for new software development, training, and technical support. Also responsible for customer consultation for product growth and custom application development. Current focus for company is to manage projects for software deployment and implementation.

SKILLS

Programming Languages

- Microsoft .NET Development Platform
- JavaScript
- Visual Basic
- VBScript

APIs and SDKs

- Visionshape SDK
- Laserfiche SDK

Environments and Systems

- SQL Server
- Microsoft Windows
- Unix

Applications

- Microsoft Office Suite
 - Microsoft Project
 - Mind Map
 - Microsoft Visio
 - Asana
-

EXPERIENCE

Complete Paperless Solutions (formerly Datanet Solutions) / Project Manager

04/2005 – Present

- Responsible for successfully managing the deployment of over 30 Laserfiche installations for Municipalities (10), Law Enforcement Agencies (3), Non-Profits (5), Utility Agencies (7), Education (2), Unions (2), and Private Companies (7). Five of the deployments follow California Trusted Systems
 - Responsible for successfully executing 10 conversions for SIRE (3), SharePoint (1), Questys (2), On Base (1) and Windows File Systems (3).
 - Responsible for successfully deploying Records Management Edition for Laserfiche for Municipalities and Utilities Agencies.
 - Participated in the design and deployment of numerous integrations for Laserfiche with SharePoint, Accela, OpenGov, Payroll Systems, Siebel, Anoto, Check21 systems, Content Management Systems, and customers' In-House applications.
 - Responsible for technical support for all escalated Complete Paperless Solutions products.
 - Authored Knowledgebase articles, procedural instructions for customers, technical tips for CPS newsletters, and creation of internal procedures for technical support and product deployment.
 - Participates in consultation with existing customers about their current processes and how to improve them.
-

EDUCATION

- Bachelor of Science in Computer Information Systems from DeVry University (Summa Cum Laude).
- Laserfiche Platinum, Administration, Business Process Design, and Records Management certified.

Joe will coordinate with Arsene Hanssens the conversion of SharePoint and files on the server.



Arsene Hanssens

ahanssens@cps247.com | 714-292-4759

SUMMARY

Currently manages a development team which creates applications for system conversions and systems integration. Also developed and manages customer custom applications for image management, timecard management software, data transformation software, and property management software.

SKILLS

Programming Languages

- Microsoft .NET Development Platform
- C
- C++
- VBScript
- JavaScript

APIs and SDKs

- Pdflib SDKs
- Anoto Digital Pen SDK
- Vision Objects ICR SDK
- Fulcrum OCR SDKs
- ABBY FineReader SDKs
- Laserfiche SDK

Environments

- Microsoft Windows
- MS-DOS
- Unix
- Linux

Applications

- Microsoft Word, Excel, and Access
 - Adobe Acrobat
-

EXPERIENCE

Complete Paperless Solutions / Software Engineer

05/2010 - Present

Managed all development projects. Multiple conversions from older document management system such as SIRE, Liberty, Questys, SharePoint, and File Systems were converted to the Laserfiche electronic document management system. Most custom projects utilized the Laserfiche SDK to solve the customer's particular document management issues.

Datanet Solutions / Software Engineer

02/2006 – 05/2010

Directed ongoing document management software solutions with Laserfiche as the main EDMS system. Led the creation of development infrastructure that emphasized add-ons and new features to existing products without compromising backward compatibility. Supervising full execution of numerous document management repository-based customized projects.

EDUCATION

Master of Science in Solid State Physics from University of Gent (Belgium)



SUMMARY

23 years of experience writing applications and toolkits in the document imaging industry in C++ and C#. 14 years of experience writing client/server applications in C#.

SKILLS

Programming Languages

- Microsoft .NET C#
- ASP.NET, ASP.NET MVC, ASP.NET Core
- C++
- JavaScript
- Java

Environments

- Microsoft Windows
- Unix
- Linux
- SQL Server
- Android
- Firebird
- Silverlight

SDKs

- Pdfflib SDKs
 - Anoto Digital Pen SDK
 - Vision Objects ICR SDK
 - Laserfiche SDK
-

EXPERIENCE

Complete Paperless Solutions / Software Engineer

04/2010 - Present

Responsible for developing and maintaining computer programs related to document imaging and document management systems, primarily client/server products. Wrote and maintained a large portion of the code in many enterprise-level systems. Most of those systems were either a front end to Laserfiche or Laserfiche was the back end of the developed system.

Datanet Solutions / Software Engineer

08/2006 – 03/2010

Responsible for developing and maintaining computer programs related to document imaging and financial applications, primarily client/server products. Wrote and maintained a large portion of the code in Checkmation (a remote check21 processing and deposit system) and Accent (a timesheet management system).

EDUCATION

- Bachelors degree in Computer Science from California State Fullerton

To follow Terrence Srey and Joseph Uyan will assist Joe and Arsene with the implementation and set up of the system and training.



Terrence Srey

tsrey@cps247.com | 714-336-6803

SUMMARY

Over 15 years of experience integrating enterprise content management systems and developing business processes for multiple industries with varying compliance and regulatory demands while also maintaining strong client relations. Began career as a scanner operator while maintaining scanner hardware and capture software environments. Developed keen knowledge of all aspects of the Laserfiche Suite of products. Cultivated 12+ years of experience working with both public and private sector clientele to develop streamlined business systems and best practices.

SKILLS

- Laserfiche System Architecture
- Laserfiche Workflow/Process Automation
- Laserfiche Forms/Business Process Module
- Laserfiche Capture Modules
- Fujitsu Scanner Product Line
- Canon Scanner Product Line

EXPERIENCE

Complete Paperless Solutions / Professional Service Group 02/2004 - Present

- Scanning bureau manager that coordinated multiple active scan jobs to ensure punctual delivery. Lead a team of scanning operators. Maintained both hardware and scanning software environments.
- Tested and bug-tracked scanning software that was internally developed.
- Provided onsite and over the phone technical support for Laserfiche products.
- Authored and maintained support case documentation for future reference
- Analyze client’s business processes to develop streamlined digital approaches to current manual processes while also addressing known and predetermined pitfalls in the process.
- Construct Laserfiche Workflow business processes and create documentation for system administration and end users.
- Provide live, interactive training for administrative and end users while also serving as the primary representative for product support.

EDUCATION

Devry University / Associate of Science in Electronics and Computer Technology 08/2001 – 02/2003
Laserfiche / Forms Design and Usage Certification Current



Joseph Uyan

juyan@cps247.com | 714-336-7258

SUMMARY

Member of the CPS Professional Services team with over 18 years of experience in the implementation, configuration, support and troubleshooting of the Laserfiche software.

SKILLS

- Strong analytical and problem-solving skills
- Strong written and verbal communication skills
- General IT knowledge of Windows server/client operating systems
- Knowledge of Web and SQL servers (IIS, MSSQL)
- Familiarity with AWS
- Understanding of records management concepts and best practices

EXPERIENCE

Complete Paperless Solutions / Professional Services Group 08/2005 - Present

- Primary responsibility in the immediate response and resolution of client needs
- Sharing in the duties of technical support and professional services
- Project management in the analysis, planning and implementation of turnkey solutions
- Performing remote and onsite installations, system inspections and end-user training
- Providing consultation in the configuration, system design, best practices, and usage of the Laserfiche software
- Providing post-implementation support, troubleshooting and maintenance
- Assisting in areas of pre-sales and sales demonstrations
- Performing software testing and bug verification for the CPS software
- Working with developers to troubleshoot, recreate and resolve complex issues
- Participated in the development of end-user education and documentation

EDUCATION

California State University Long Beach 05/1996

- School of Business Administration, B.S. in Financial Management

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. Questys to Laserfiche Conversion

a. Document Conversion

The content which will be converted into Laserfiche documents reside in a Questys Document Management System. The Questys contents will utilize the combination of Questys data and Questys file system storage content to import into Laserfiche.

b. Audit Report

After the document conversion, CPS will be responsible for submitting a report to the Stakeholders which summarizes the records/documents which did not make it into Laserfiche or are in Laserfiche but require attention along with a document count of those which were successfully imported. The Audit Report will also have instructions as to next steps taken with the errored documents.

4. Pricing Proposal

All pricing is based off NCPA Contract #11-25 which is a competitively bid government contract NCPA (National Cooperative Purchasing Alliance) is a leading national government purchasing cooperative working to reduce the cost of goods and services by leveraging the purchasing power of public agencies in all 50 states. NCPA utilizes state of the art procurement resources and solutions that result in cooperative purchasing contracts that ensure all public agencies are receiving products and services of the highest quality at the lowest prices.

a. Laserfiche Avante

Description	Quantity	Public Price
Laserfiche Avante Full SQL Server, incl. Workflow	1	\$5,000.00
Laserfiche Named users, incl. thin client, Email, Snapshot and Form Essentials	15	\$9,000.00
Laserfiche Starter Public Portal (10 Concurrent Retrieval Views)	1	\$15,000.00
Laserfiche Connector	15	\$375.00
Sub-Total	\$29,375.00	
Total Software		\$29,375.00

b. Laserfiche Avante Optional Products with Basic Support

Description	Quantity	Public Price
Laserfiche Forms Professional	15	\$750.00
Laserfiche Forms Professional Basic LSAP	15	\$150.00
Laserfiche Forms Portal	1	\$7,995.00
Laserfiche Forms Portal Basic LSAP	1	\$1,600.00
Laserfiche Quick Fields Zone OCR and Validation	1	\$2,795.00
Laserfiche Quick Fields Zone OCR and Validation Basic LSAP	1	\$560.00
Laserfiche Quick Fields Real Time Look Up and Validation	1	\$595.00
Laserfiche Quick Fields Real Time Look Up and Validation Basic LSAP	1	\$120.00
Laserfiche Quick Fields Barcode and Validation	1	\$1,695.00
Laserfiche Quick Fields Barcode and Validation Basic LSAP	1	\$340.00
Laserfiche Standard Public Portal (25 Concurrent Retrieval Views)	1	\$25,000.00
Laserfiche Standard Public Portal (25 Concurrent Retrieval Views) Basic LSAP	1	\$5,000.00

c. Professional Services

Description	Quantity	Public Price
Project Management	2	\$3,600.00
Installation and setup	1	\$1,600.00
Taxonomy and Design	1	\$1,600.00
Training: Admin Level I	1	\$1,600.00
End User Training (multiple classes)	1	\$1,600.00
Questys Data Conversion	1	\$25,000.00
Total Professional Services		\$35,000.00

No Workflow or Form Design included.

d. Laserfiche support services

Description	Quantity	Public Price
Laserfiche Avante Server	1	\$1,000.00
Laserfiche Named users	15	\$1,800.00
Laserfiche Portal	1	\$3,000.00
Laserfiche Connector	15	\$75.00
Total Support		\$5,875.00

e. Optional Pricing for Support

Basic	Priority	VIP
Included	\$8,812.50	\$11,750.00

f. Turnkey Solution

Description	Quantity	Public Price
Software	1	\$29,375.00
Professional Services	1	\$35,000.00
Laserfiche Support – 1 st year	1	\$5,875.00
Total Turnkey Solution Basic Support		\$70,250.00
Total Turnkey Solution Priority Support		\$79,062.50
Total Turnkey Solution VIP Support		\$82,000.00

5. Payment Terms

Description	%
Order	50
Project completion	50

6. Acceptance

Client: City of National City

Provider: Complete Paperless Solutions

Print Name:

Date:

Signature:
