

# Town of Andover

Essex County

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## Enterprise Content Management System – Laserfiche Cloud

June 7, 2022

Valid for 30 days



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## LASERFICHE CLOUD LICENSE OVERVIEW

The Laserfiche Cloud license introduces a straightforward software license that includes a wide variety of features to benefit all departments of the municipality. This package includes document management automation, a public portal to host public records and all training necessary to get started. All of this is hosted on Amazon Web Services, so no internal IT resources are required.

Features	
Full Users	✓
100 GB storage per user	✓
Document Management	✓
Audit Trail	Advanced with Watermarks
Direct Share	✓
Data Encrypted at Rest	✓
Automated and Encrypted Backups	✓
Automated Text Extraction (OCR)	✓
Import Agent with Email Archiving	✓
Connector	✓
Surveys	✓
Records Management	✓

Cloud Add-Ons	
Quick Fields Complete with Agent	10+
Workflow Bots for Process Automator	1+
Public Portal	Unlimited
Forms Portal	Unlimited
Participant or Community Users	Can be Purchased

Cloud Integrations	
Microsoft 365 Integration w/ Co-Editing	✓
Integration with DocuSign	✓

### Laserfiche Cloud Business Tier Features

\*As a cloud-based system, updates and new features are automatically pushed out, no IT involvement.

#### Annual Software and Support

Laserfiche Cloud Business Tier includes all of the necessary components (e.g. Forms Portal, Records Management Module, Public Portal, etc.) that you will need to get started and furthermore, to expand the system in the future. On a monthly basis Laserfiche adds features and performance enhancements to an existing version of its software known as “updates.” Licensee will receive all updates as released.

#### Additional Module Training

The Laserfiche Cloud license comes with the ability to create online Forms and Surveys, use Laserfiche Connector to manipulate data in 3<sup>rd</sup> party programs, use Quick Fields to capture batches of documents to save time, and much more. Some of these modules are easy to learn in 1-2 hours while others may take 4-6 hours. We will work with you to determine the number of hours of training you would like and agree before proceeding with any training.

### **Automation Configuration with Laserfiche Process Automation Tools**

Tools included with the Laserfiche Cloud include Workflow, Robotic Process Automation, online Forms, Records Management, and more. We work to understand your process and use the existing tool set to build automation suited specifically to your environment. All projects will be scoped out ahead of time and the hours/price agreed to before beginning any work.

### **Access to Online Support Resources**

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

## Pricing/Services:

Product	Description	Qty	Model #	Unit Price	Total Price
<b>*Cloud Users</b>	Full Users – Business Tier	25	CLENF3	\$921.50	\$23,037.50
<b>Storage</b>	100 GB per user included (Overages will be \$30 per 10 GB annually) Storage is pooled and up to 10 TB	-		-	-
<b>GSAP</b>	ICC-CDS Support	25		\$114.00	\$2,850.00
<b>Laserfiche Install and Training</b>	On-site Days	2		\$1,950.00	\$3,900.00
<b>Laserfiche Forms Install and Training</b>	On-site Days	2		\$1,950.00	\$3,900.00
<b>Quick Fields Setup and Training</b>	On-site Days - includes up to 3 sessions	1		\$1,950.00	\$1,950.00
<b>**OpenGov-Laserfiche Integration</b>	Systems integration	1		\$3,200.00	\$3,200.00
<b>Project Coordination</b>	Remote	1		\$300.00	\$300.00
<b>Laserfiche Trade-in credit</b>	Upgrade credit	1		-\$764.00	-\$764.00
<b>Total</b>					<b>\$38,373.50</b>

*Year 2 for the described Laserfiche Cloud solution: \$25,887.50*

*\*Laserfiche SAAS Software priced at National Cooperative Purchasing Alliance (NCPA) levels*

*\*\*See Appendix B for a detailed Statement of Work: OpenGov-Laserfiche Integration*

## AUTHORIZATION & AGREEMENT

The **Town of Andover, Essex County, Massachusetts** hereby agrees to the procedures outlined above, to ICC-CDS's Content Management Solutions Terms & Conditions and to the License Agreements for the software referred to above, all of which are available at <http://icc-cds.com/terms-conditions>, and are incorporated herein by reference, and authorizes ICC-CDS to proceed with the project.

### **Electronic Document Management Project**

**\$38,373.50**

*Estimated Annual support fee second year forward (SAAS): \$25,887.50*

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

### **SOFTWARE ORDER, PAYMENT AND PERFORMANCE SCHEDULE**

\$25,123.50 of the project price shall be invoiced upon customer site activation.  
\$4,200.00 of the Laserfiche Training and Consulting services shall be invoiced upon their completion.  
\$3,900.00 of the Laserfiche Follow-up Training services shall be invoiced upon their completion.  
\$1,950.00 of the Laserfiche Quick Fields Setup and Training services shall be invoiced upon their completion.  
\$3,200.00 of the OpenGov/Laserfiche Integration services shall be invoiced upon their completion.

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

**Department:** \_\_\_\_\_ **Contact Name:** \_\_\_\_\_

### **TOWN OF ANDOVER, ESSEX COUNTY, MASSACHUSETTS**

By: Theresa Penner In the Presence of: Janel Brewer  
Title: Purchasing Agent Title: Purchasing Assistant  
Date: 6/8/22 Date: 6/8/22

### **ICC-CDS, LLC**

By: D. Ross In the Presence of: Kathleen Ross  
Title: General Manager Title: Finance Operations Manager  
Date: 6/8/22 Date: 6/8/22

**To authorize the project:**

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

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## APPENDIX A – INSTALLATION, TRAINING AND SUPPORT

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### Pre-Installation Teleconference and Technical Review

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

### Customized Training

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

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

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

### **TECHNICAL SUPPORT**

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

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

## **SOFTWARE PATCHES AND UPGRADES:**

In addition to receiving technical support, customers with a current LSAP/SAAS contract will receive **critical program updates within the current version of Laserfiche**. This is extremely important because Laserfiche is continuously improved to be even more powerful and efficient. You will receive routine system updates released by the manufacturer automatically.

### Services covered under Support:

- Remote troubleshooting and repair to the best of our ability of any errors generated by Laserfiche
- Remote troubleshooting and repair to the best of our ability any Laserfiche functionality that is not working
- Respond to request calls within 8 business hours, if not immediately
- Provide technical support between the hours of 8:00 AM - 5:00 PM
- User group meetings
- Access to Laserfiche's knowledgebase
- Access to webinars

### Services not covered under Support:

- Training - New user or refresher training - either on-site or remote
- Support or troubleshooting of third-party software
- Faults or problems caused by unauthorized access to configuration information or changes to components by the user or a third party.
- Installation, Migration, Upgrading of software related to major software releases
- Problems or faults caused by use of the product outside its normal operating conditions.
- On-site technical support, unless it is specifically included as part of the selected Agreement or funded by the Customer on a per-day basis as part of a signed Change Order.
- On-site consulting or training, unless it is specifically included as part of the selected Agreement or funded by the Customer on a per-day basis as part of a signed Change Order.

### Customer's Obligation:

- To have Internet access on the Laserfiche server and all workstations where the Laserfiche client is installed and be willing to allow our Support Technicians remote access to the Customer's Laserfiche system via GoToAssist or other acceptable remote access tool.
- To designate an IT contact and to provide the name, phone number and e-mail address on the registration form.
- To describe technical issues completely in order to provide ICC-CDS's Support Technician sufficient information to be able to diagnose and reproduce the problem, including any identified error codes.

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## APPENDIX B – OPENGOV/VIEWPOINT-LASERFICHE INTEGRATION

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### STATEMENT OF WORK – OpenGov Synchronization PROCESS

#### Introduction:

At the Town’s request, General Code will develop a Synchronization to process these documents using the SQL file provided by OpenGov.

After the initial download of the existing files, the Town would like to continue to use the Synchronization on a scheduled basis to bring new documents entered into OpenGov into the Laserfiche Repository.

#### Project Objective:

The objective of this project is to build a Synchronization that will automate the import, template assignment, metadata population, document naming and routing of documents from the OpenGov application into the Town’s Laserfiche repository.

#### Scope:

General Code will develop a Synchronization to process these documents using the SQL file provided by OpenGov. The Synchronization will include importing the identified documents into Laserfiche with additional processing to assign the Property template, populate metadata, name the documents and route the document to the appropriate folder.

After the initial download of the existing files, the Town would like to continue to use the developed Synchronization on a periodic basis to bring new documents entered into OpenGov into the Laserfiche Repository.

#### OpenGov Document Access for Import

OpenGov will provide an SQL listing of documents and associated metadata for import into Laserfiche. OpenGov will identify documents for import from cloud storage into Laserfiche using a URL path from the OpenGov database associated with each property.

#### Document Naming:

Documents imported from OpenGov will be named as follows:

- TBD

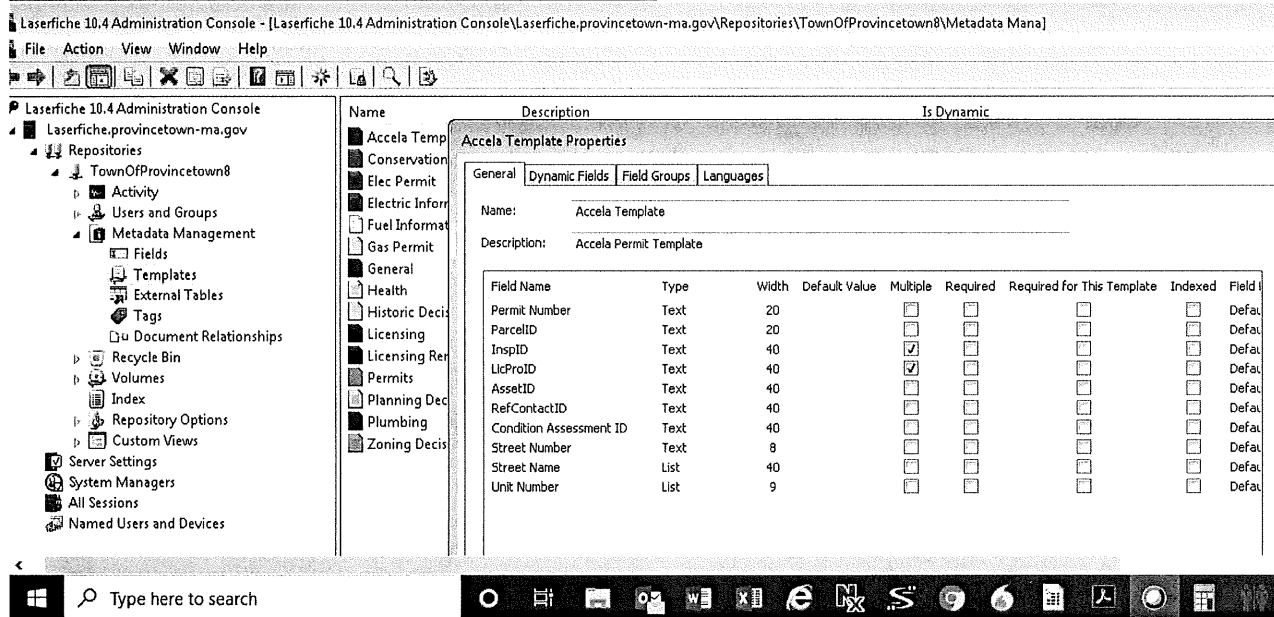
#### Document Organization:

- TBD

Sample Organization Structure provided by customer (Document names are just examples):

- Street Name
  - Street Address
    - 1 Street Name
      - Department Subfolder (e.g. Building, Conservation, Health, Historic, Planning, etc.)
      - B-17-210 Permit For: Interior Alterations
      - FM-18-37 License For: Food Establishment – Risk Category 3
    - 2 Street Name
      - Department Subfolder (e.g. Building, Conservation, Health, Historic, Planning, etc.)
      - E-18-68 Permit For: Miscellaneous Electric
    - 3 Street Name
      - Department Subfolder (e.g. Building, Conservation, Health, Historic, Planning, etc.)
      - P-18-42 Permit For: Replacement
  - UNK Street Name (This process would never use this folder)

**SAMPLE Template Assignment and Metadata Population:**



**This is a sample Laserfiche index**

All data pushed into the metadata fields will be as they are provided from OpenGov with no additional validation provided.

**Import Validation:**

The Document importer will include an additional metadata field, "UPLOAD BATCH", to be attached to Imported documents for tracking and validation of files automatically uploaded.

- The Laserfiche import will append an additional field onto each document with the OpenGov batch number the Document is associated with.

- The Laserfiche import will send a link of a report for that OpenGov upload to a designated user for validation of document uploads/upload correctness.

Scheduled Processing:

The Synchronization will run periodically to identify new documents from the OpenGov SQL file for processing. The frequency and timing of the process can be determined by the Town of Andover with agreement from the OpenGov and General Code team.

*Initially the Town is considering daily processing.*

**Note:** This is a 1-way push from OpenGov to Laserfiche