

**YOUR SOLUTIONS SUCCESS HAS A PLAN, NAME,
COMPANY WITH 30 YEARS OF PREDICTABLE SUCCESS
BEHIND IT**



Request for Information



City of Naples

Revised: June 30, 2016

By



Patricia L. Rambosk

City Clerk

prambosk@naplesgov.com

239.213.1064

City of Naples

735 8th Street South; Naples, FL 34102

RESPONSE LETTER



Patricia L. Rambosk, City Clerk
prambosk@naplesgov.com
239.213.1064
City of Naples
735 8th Street South; Naples, FL 34102

Dear Ms. Rambosk,

Questys Solutions (Questys) appreciates the opportunity to respond to the City of Naples request for information and a proposal for a Clerk Department's Document, Records Management and Web Access Search solution with unlimited users. We are humbled to have been servicing the City of Naples since 3/9/2001.

On July 18th you send the following request:

I am looking for the following information regarding your document management and retention software platform(s) by Questys. The City of Naples is now on Tyler Munis ERP software platform and Questys will work with you to communicate and interoperate with the systems should the need be required.

Questys has over 1,000 clients of which 51 clients are in Florida, many of them were acquired via our partner channel. Thus, I do not have a relationship with the client only visibility to the partner. However, the following cities we do have direct relationships with:

Municipality	Customer since	RFP or RFI numbers and/or Contract numbers
City Of Mount Dora, FL	2002	Direct sale. No known Contract Vehicle
City of Naples, FL	2001	Direct sale. No known Contract Vehicle
City of Ormond Beach, FL	2001	Direct sale. No known Contract Vehicle
Public Safety Management (10 Systems) Clearwater, FL	2002	Direct sale. No known Contract Vehicle
Redlands Christians Migrant Association - Immokalee, FL	2012	Direct sale. No Contract Vehicle
City of St. Pete Beach, FL	2001	Direct sale. No known Contract Vehicle
Greenscapes Landscaping, Naples, FL	2015	Direct sale. No known Contract Vehicle

1. Continual investment from Questys will insure you have a solution that will always meet your needs

Questys has been selected and proven at many Large and small Government jurisdictions including Towns and Countries-wide deployments for its ease of use, high levels of productivity, compliance and most of all reliability. Our clients relied on Questys to invest in an Enterprise Wide solution that would insure the longevity of the solution they originally purchased.

As you may know, Questys Solutions is the actual *software developer* and the solution of choice selected by Tulare County, County of Monterey, Common Wealth of Virginia, San Joaquin County, CA, City of Anaheim, CA, City of St. Petersburg, FL, City of Yorba Linda, CA Kern County CA, Albert Municipal League, Canada, Dominica government, among many other much-admired organizations and brands. Most of these jurisdictions selected Questys Solutions after months of research, due diligence, and rigorous competition, which often began with an engagement similar to that of the City of Naples. In the market place, Questys has successfully competed against every other vendor by proving that we deliver a solution capable of providing dramatically more business value. In this response, we would like to call out that feature for feature, function for function and overall benefits Questys is comparable and in many cases better than any solution in the market today. When consideration is given to the existing investment and the new changes and improvements that will be implemented to the solution, we will show that Questys is the right business, technical and fiscally responsible decision for the City of Naples.

We know that it has been a considerable amount of time since you originally deployed the solution and some of the decisions you made might be different today as Questys is significantly different than what existed in the past. Questys' call to action is for the city to take the time to understand what Questys has to offer in light of our investments and commitment to future investment for you and our entire client base.

Thank you for your consideration of our thoughtful response. We look forward to working with the City of Naples' team in providing significant value to you, the citizens, staff and council.

Questys is committed to continuing to earn The City of Naples' business and we look forward to the opportunity to serve you as one of the owners and a resident of the City of Naples, you have my personal commitment to ensure the success of the solution. Subsequently, should you have additional questions, please feel free to contact Esther Byrd at esther.byrd@questys.com; 877.362.6246 ext: 2130.

Respectfully,

Esther Byrd

Esther Byrd

Sr. Solutions Manager



, a Division of



www.questyssolutions.com

www.harriserp.com

Email: esther.byrd@questys.com

Phone: 877.362.6246 x2130

TABLE OF CONTENTS

Response letter	3
Section 1: Executive Summary.....	6
Competitive Differentiators	7
Section 2: Company Background	8
Knowledge of Global Trends in Information Management	9
Section 3: Firm’s Qualifications	11
Statement of Qualifications	11
Client Relationships	12
Practical Information Management Expertise and Experience	12
Project Organization	13
Section 4: Similar Projects	15
Section 5: Client References	18
Sample Project Management Methodology	19
As the fifth step, Task Managers will prepare individual task plans. This will be accomplished by:.....	20
SAMPLE PROJECT ROLES AND RESPONSIBILITIES	22
Sample: Training and Knowledge Transfer	24
MAINTENANCE AND SUPPORT	27
TECHNICAL SUPPORT	29
Section 5 ECMX Software Solution	30
Section 5.1 ECMX Hardware /Peripherals	34
Section 5.2 Sample Networked Configuration:	35
Section 5.3 System Requirements	36
Section 6: Acknowledgements, Additions and Exceptions	37
Appendix – Available upon request	38
Brochures/Literature	38
White Papers	38
PRICING	39
Authorization.....	40
Completion Signoff	40

SECTION 1: EXECUTIVE SUMMARY

Questys Solutions Enterprise Content Management System (ECMS) and Agenda Management Solutions meet the following objectives:

- Enhance internal operating efficiencies and service delivery to the City's customer, residents, visitors and business community
- Staff time savings
- Cost savings
- Increase efficiency and staff productivity
- Enhanced Customer Service
- Business Process Improvement
- Improved document and records management
- Space Savings

For more than 10 years, the City of Naples has relied upon the Questys document management system to securely capture, store and manage important and historical documents in the building department. During this time period, the City has made significant improvements to the way in which they use the solutions by expanding the number and types of documents that they image and store, as well as the methods by which they index, distribute, and apply records retention schedules to, those documents.

With Questys ECMx 11, the City would benefit from a comprehensive information management system that integrates both electronic and paper documents and information from mission-critical applications and legacy systems, into enterprise wide department and business processes. One of the benefits of this implementation will be to curtail the duplication and fragmentation of information stored in various imaged paper and electronic document formats. By centralizing the storage of these critical documents in the Questys Solution, their security and integrity will be maintained throughout their records management lifecycle.

The features of the new Questys ECMx platform allow the implementation of Questys throughout the City in a simplified structure based on number of users. Under the licensing agreement, all advanced features of the core Questys Solution are available to all users without having to license them on a per-module basis. This eases the enforcement of records retention policies and procedures and provides a secure and audited method for retrieval and distribution.

Following is a breakdown of the features and benefits for an enterprise deployment.

- Provide virtually unlimited secure Public Access
- Enterprise expansion in a three phased approach to all city departments with the complete product suite functionality
- Ability for City Clerk's office to implement a transparent records management system and formal records plan for all departments
- Ability for the finance and purchasing department to improve efficiency and processes
- Ability for the Clerk and City Manager to implement an Agenda Management Solution which integrates with Granicus

- Greater risk management and eDiscovery capabilities

As more and more information is being created and stored in electronic format, the requirements for managing the capture, distribution, and retention of that information increases.

The City of Naples is nationally recognized as a leader and it is our intent to deliver a solution that is recognized for its information management and technological accomplishments in implementing document and records management, technologies and best-practices. This on-going initiative to continually improve upon current capabilities by investing in new technologies while leveraging existing investments will continue to provide invaluable cost-saving benefits to the City.

With the features available in the latest Questys ECMx platform and structure, the opportunity is here for the City to take advantage of this unique offering and implement Questys solutions to increase productivity, reduce costs and achieve compliance in the most cost effective manner possible.

The foundation of the proposed solution is developed and licensed to be implemented as core infrastructure technology. The system bundles functionality and provides for the deployment of unlimited servers and repositories so individual departments have access to the tools they need to solve their specific business problems while the enterprise has complete control over system topology. Questys provides the ability to deploy multiple systems for production, testing and development.

COMPETITIVE DIFFERENTIATORS

In addition to having a particularly powerful and intuitive product suite, Questys fosters a user community and have invested and committed to providing best in class support. We have focused on creating a product which is easy to deploy and encourages innovation amongst our users. We energize our user community with forums, online and in-person training classes, customer round tables, user groups, and soon to be announced 2014 People More Productive Now! Regional conferences. Additionally, Questys offers an out of the box solution that is customizable to nearly any use case in a wide variety of industries training to meet high availability, disaster recovery and changing development needs archival system, for “Transparent Records Management” and for automating document centric business processes and filing through the use of the Questys Automated Workflow functionality.

Questys is an integrated agenda, records, document and image management system capable of storing and managing physical and electronic documents. Its functionality spans several technological areas: Capture, Imaging, Data Recognition, Document Management, Records Management, Workflow, Interoperability, Security and Data Portability. Questys features open system architecture and it can be integrated with all SQL database managers and in-house applications. It uses standard PC components which provides for simple and inexpensive maintenance. It supports automated text recognition and index generation, and it is economical to operate. Its modular design facilitates economical system expansion.

Questys ECMx version 11 is a contemporary ECMS by today's AIIM's standards in that today Questys meets the AIIM definition of ECM and uses open standards in all aspect of the solution and is interoperable with other applications and data sources. Questys efficiently offers departmental and enterprise wide commercial off-the-shelf software that is easily extended and configured to meet the needs of your internal, external customers, organization and constituents. Questys ECMx has moved to

developing template departmental solutions to help jump start organizations and each solution offers easy and timely access to data from within and even external (GIS, ERP, CRM) information while insuring privacy of individuals.

SECTION 2: COMPANY BACKGROUND

Questys Solutions (Questys) is a leading provider of agenda, document management, workflow, and records management, and content management. The company offers customer flexible options in the form of an On-premise and Cloud offering. The Company was founded in 1980 and incorporated in 1981 in the State of California. Its charter and areas of expertise include:

- Information management
- Office automation
- Electronic imaging
- Workflow
- Agenda Management
- Business process re-engineering
- Project management
- Records management
- Content Management
- Litigation support

In addition to industry leading products and solutions, Questys offers value added consulting services, including but not limited to system and process surveys and diagnostic evaluations; best practices, business process re-engineering and the design of electronic imaging, workflow and office productivity systems. In the field of information technology, its focus is on the development, marketing, distribution and support of departmental and enterprise wide electronic imaging, capture, workflow, document management, records management, electronic signature and project management systems.

Questys features a comprehensive workflow suite complete with templates, powerful enough for the technical staff and easy enough to use for the business analyst and user. Several information retrieval techniques, and extremely fast indexing and search algorithm Information may be retrieved through the search of individual databases or by means of a hybrid retrieval technique (combined search of full text and pseudo-relational databases). In virtually all cases, the system will locate a record in a database containing millions of pages within seconds. Relevant information is identified precisely, down to the individual pages containing the terms specified by a user. These pages, corresponding documents, or results of an entire search may be viewed on a terminal, output to a printer or an electronic file, or exported via facsimile.

Questys Solutions believes that it is best qualified to deliver the product and services required by the City of Naples because of its extensive experience, qualified staff, knowledge of the customer's needs. These attributes are enhanced and magnified by the fact that Questys Solutions is the developer of the proposed system and we believe our proposal will show the following:

1. Taking into account the existing investment our comprehensive "new" solution is feature to feature and function to function comparative competitively at a fraction of the price.
2. As a resident of Naples I will personally make sure your needs are met and the highest level of value is obtained.
3. Our solution provides the least amount of risk associated with migration and loss of productivity and data
4. One ECM solution to meet your enterprise needs today based on Microsoft ASP 4.5 and industry standards

5. Questys Legislative Agenda (LSx) will achieve your objectives for a workflow driven solution and integrate with your existing Granicus solution
6. Questys ECMx 11 capabilities provide a solution that meets all your needs today and into the future.
7. Workflow capabilities that will improve department productivity and compliance
8. We can help you achieve productivity and compliance with technology and best practices consultative services as it is more than adding a new vendor it is important to have process and governance too
9. Continual investment from Questys will insure you have a solution that will always meet your needs.

Since being acquired in 2012 Questys has focused on build an industry competitive and leading Enterprise Content Management Solution. To accomplish this objective, we have hired 11 new professionals at the company. We have hired employees in the areas of Development, Quality Assurance (Q/A), Support, Sales and Marketing to improve and innovate the products, solutions, services and support to best meet our customer needs. In addition to internal employees we have an off-shore development team and three development resources in Canada. We intend to grow our business in a healthy and predictable manner while supporting our client base who we think of as not only clients, but investors too as maintenance support is 100 percent (100%) reinvested back into the company. In addition to organic growth, Questys has several acquisition planned.

The Company is headquartered in Irvine, California, and its offices are located in Naples, FL, Montreal and Belgrade, Serbia.

KNOWLEDGE OF GLOBAL TRENDS IN INFORMATION MANAGEMENT

Questys Solutions closely follows anticipated trends and actual developments in the information management industry and enhances its products to keep pace with open standards trends offering leading edge technology solutions that meet interoperability standards. Questys Solutions is one of the true imaging industry pioneers. Today we have the distinct advantage of adding value to our core platform in association with the Microsoft Platform. Improvements to our products and services will come from:

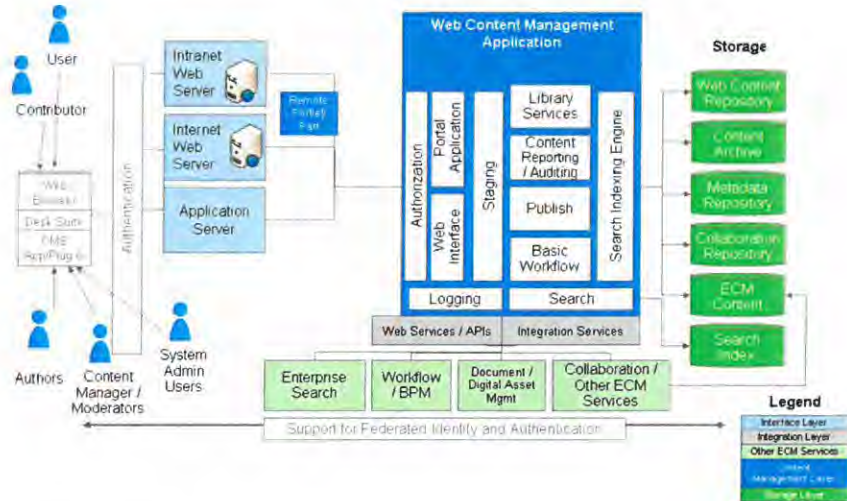
Closer integration to Microsoft Office and Productivity

Suites (Including SharePoint):

- a. Intranet portals,
- b. Document & file management,
- c. Collaboration,
- d. Social networks,
- e. Extranets,
- f. Websites,
- g. Enterprise search improvements,

- h. Business intelligence,
- i. System integration,
- j. Process integration, and
- k. Workflow automation capabilities

Some of the challenges that existed in the past, that **do not** exist today and create clear advantages for Questys over the competition:



- o Deployment Flexibility
- o Business Process and Collaboration
- o Transparent Records Management
- o Capture
- o Capture with Workflow
- o ECM as a Federated and shared service
- o Insuring Governance and risk compliance
- o Local and Federated searching
- o Comprehensive ECM tool set completely available and licensed to the City of Naples

A pivotal element in achieving our goal for customer satisfaction is Questys Solutions' policy to listen to its clients and enhance its products to better serve clients' needs. We receive requests for system enhancements from our clients, partners and Questys Solutions staff. These requests are reviewed monthly by the Technology Committee and classified into three categories: major product enhancements, minor product enhancements and system customization requests. The major and minor product enhancements include features that benefit a large number of clients, while customization requests include modifications that benefit a single client. The former are implemented at no cost to our clients, and the latter are estimated and implemented for a fee. In general, minor enhancements are made available via quarterly product updates, and major enhancements are released annually.

To meet with industry trend, Questys is partnered with numerous organizations for local support and representation along with integrated partners such as Fujitsu, Toshiba, SunGard H.T.E, Accela, GIS, ESRI, CPAS, and Granicus just to name a few. Questys will refer a local representative if required by City of Naples.

SECTION 3:FIRM'S QUALIFICATIONS

STATEMENT OF QUALIFICATIONS

Questys Solutions' staff has extensive depth and expertise in all areas of technology related to the proposed effort. The average experience of its consulting, technical and training staff is over 12 years. Four members of its staff are Certified Document Imaging Architects, while one holds the titles of Master of Information Technologies and dual Laureate of Information Technologies in Document Imaging and Workflow from the Association for Image and Information Management (AIIM).

The long-term viability of the proposed solution is evident in the fact that its history spans over 20 years. From early 1986, when the first version of Questys Document Management system and *in 1997, the very first agenda management systems were released and installed at Kern County, CA Clerk of the Board's Office*. The system has undergone over 20 major releases, encompassed numerous versions of Windows operating systems, incorporated several database managers and was rewritten using several programming environments. Throughout this lengthy period, Questys has maintained its technological leadership and competitive posture, and is as viable today as at any other time since its original release.

Questys Solutions' products and services are provided to dealers, VARs, integrators and end users worldwide. During the past years, Questys Solutions has developed applications for and provided services to numerous organizations within the private sector and government agencies. These applications and services are benefiting financial and medical institutions, utility companies, law firms, architect-engineers/constructors and agencies of federal, state and local government.

Along with having state of the art content management and agenda system, we believe providing quality customer service to our clients is very, very important. Being responsive and providing best quality service to public is the utmost important therefore, it is imperative that we are responsive and take care of your issue immediately. With our East and West Coast support team, rest assures you will be taken care of beyond your standard business hours.

To provide the best service possible and to minimize the client cost, Questys University offers FREE online training programs for all Questys clients. In this economic crisis, we need to do whatever possible to help our Questys clients.

At Questys Solutions, we have an open door policy and welcome any suggestions or inputs from our clients. State-of-the-art product, competitive pricing, easy to implement, ease-of-use, easy to support along with quality service, this is what we can offer to City of Naples!

Specializing in the public sector, we now have hundreds of clients using our system and they are solid proven system!

CLIENT RELATIONSHIPS

The Company strives to have open and direct communications with its clients, which facilitates optimization of project results. Since technologies change and people are liable to make an occasional mistake, we cannot promise absolute perfection. However, we do promise to communicate to with you promptly, to let you know about any problems as soon as we become aware of them, and to resolve issues client's full satisfaction. We have followed these principles since the formation of the firm, and its result is excellent relationships with our clients.

PRACTICAL INFORMATION MANAGEMENT EXPERTISE AND EXPERIENCE

Questys Solutions practical experience with information management, office productivity enhancement, management consulting and project management is evident from a list of its clients which includes hundreds of government agencies and private firms. A partial list of our clients is included below.

- Bay Area Teleport
- Boeing Corporation
- City of Anaheim, CA
- City of Barstow, CA
- City of Beaumont, TX
- City of Broken Arrow, OK
- City of Camarillo, CA
- City of Colton, CA
- City of Columbia, SC
- City of Corona, CA
- City of Davis, CA
- City of Escondido, CA
- City of Folsom, CA
- City of Fond du Lac, WI
- City of Fort Pierce, FL
- City of Industry, CA
- City of Lake Jackson, TX
- City of Laguna Hills, CA
- City of Missouri City, TX
- City of Naples, FL
- City of National City, CA
- City of Odessa, TX
- City of Naples, CA
- City of Peoria, IL
- Botswana Courts, Republic of Admin of Justice
- Presidential Office of Botswana
- City of Santa Barbara, CA
- City of Santee, CA
- City of Solana Beach, CA
- City of St. Petersburg, FL
- City of Upland, CA
- City of Wilson, NC
- City of Yorba Linda, CA
- County of Calaveras, CA
- County of Flagler, FL
- County of Fresno, CA
- County of Imperial, CA
- County of Kern, CA
- County of Mendocino, CA
- County of Merced, CA
- County of Monterey, CA
- County of San Joaquin, CA
- County of Tehama, CA
- County of Tulare, CA
- Castano Tobacco Litigation
- Dominica Government
- Commonwealth Edison Company
- Office of the Prime Minister Grenada
- Houston Lighting & Power
- Alberta Municipal League, Canada
- State of Oregon
- Tennessee State Client
- Town of Telluride, CO

PROJECT ORGANIZATION

Mr. Radivoj Rakic will participate in this project in position of Principal Applications Architect. He has over 17 years of experience in the fields of business process re-engineering, system design, systems programming, applications programming, systems analysis, engineering and construction. He is the principal developer of Questys, LSx and several other Questys Solutions software products. He has implemented these products at several clients such as the cities of Anaheim, Corona, Folsom, Nashville, Upland, and the County of Kern. Mr. Rakic has also re-engineered all of the departments and added imaging technology to the Metro Government of Nashville and Davidson Count in Tennessee. Mr. Rakic is proficient in several different computer and programming languages which include: Visual Basic, C#, ASP, JavaScript, T-SQL. He is also well versed in DOS, Windows, and Windows NT operating systems and is a Microsoft Certified Professional.

Mr. Dylan Tan will participate in this project in position of the Project Superintendent. Dylan Tan has over 15 years of experience in the field of information technologies, 10 of which have been focused in document imaging. Since Mr. Tan joined Questys Solutions in 1997 he has been involved in every technical aspect of the Questys suite of products. Having implemented Questys in numerous government and corporate organizations, Mr. Tan is highly experienced in external system integration and software customization. His ability to manipulate external data into usable data sources has been an asset to Questys Solutions.

Mr. Tan has extensive experience with server and network architectures from legacy to current technologies. He is also well versed in all Microsoft OSs as well as Mac and *nix platforms as well. Currently Mr. Tan manages QI's internal infrastructure and including voice and data systems. As Director of Technical Services, Mr. Tan leads a fully qualified staff to meet the needs of our current and future customers.

Mr. Poppin Chantarasompot will participate in this project as the subject matter expert in migrations. Mr. Poppin Chantarasompot has a Bachelor's Degree in Business Administration Finance, however, decided to follow his passion in the information technology field in 2006 for Questys Solutions. Starting in the position of technical support representative, he is able to install, troubleshoot, and support any Questys system in production. Today as a migration expert, Mr. Chantarasompot has performed more migrations than anyone in the company since the release of CMx. With his persistence, he will make sure the migration will run smoothly.

Mr. Donald Morales will participate in this project in the position of Software Installation, and Configuration Specialist. Donald Morales has over 13 years of experience in the field of information technologies. Since Mr. Morales joined Questys Solutions in 2011 he has been involved in Microsoft Server, Microsoft SQL installation, configuration, and user support for all current Questys products.

Mr. Morales has extensive experience with Microsoft Server 2000 to 2013, Microsoft IIS, Microsoft .Net, Microsoft SQL 2008 and 2013, and network architectures from legacy to current technologies. As a member of the Questys Professional Services team, as well as the client technical support team, he has the experience and knowledge to ensure your success.

Ms. Esther Byrd will participate in this project in the position of Project Lead and Trainer. She has over twenty years in Sales/Marketing and in Training specializing in with non-profit agencies, the education

sector and private companies. She has been involved in all aspects of managing projects from the inception to completion and building and growing any relationships necessary for the success of the project.

SECTION 4:SIMILAR PROJECTS

Questys Solutions has completed numerous projects whose scope and objectives reflect those described in the Request for Information at many municipalities and government agencies. This section presents recent studies representative of the proposer's expertise in addition to recent references from the public sector. These studies were selected to highlight the depth and breadth of experience Questys Solutions brings into this project, and to demonstrate the actual accomplishments achieved on similar endeavors.

REFERENCE #1	
Firm/Government Agency Name: City of Anaheim, CA	
Contact Person (name and title): Linda Andral, City Clerk	Contact's Phone: 714-765-5166
Company Address: 200 South Anaheim Boulevard Anaheim, CA 92805	Contact's E-Mail Address: landal@anaheim.net
Size of organization: 15 departments	Number of employees: approx. 3,500
Date Solution was implemented: 2002 http://www.anaheim.net/	
Description of Solution: The City been using Laserfiche DMS system for years. In 2002, the City wanted to streamline and improve its agenda management process and be able to track the approval of the agenda items through the approval process. The City selected Questys Solutions as their existing Laserfiche system was not able to meet their business requirements. The City implemented Questys Enterprise, LegisStream, Workflow, Web, and the Granicus integration module. Since 2002, through the web, City Departments submit their agenda item requests and supporting documents directly into the agenda meeting and workflow electronically route and track the items as it goes through the approval process. Since then, the City updated to the .NET ECMX Enterprise Content Management System, along with LSx Agenda Mgt System, WFX Workflow, Web, and Granicus Integration with Minute Maker. The City plans for the Council members to review the agenda packet, take their confidential notes, and follow the meeting in the Council Chamber room from there via iPad and mobile devices. Today Anaheim is beginning the move to Questys Records Management.	
REFERENCE #2	
Firm/Government Agency Name: County of Kern, CA	
Contact Person (name and title): Kathy Krouse, Clerk of the Board	Contact's Phone: 661-868-3585
Company Address: 1115 Truxtun Avenue Fifth Floor Bakersfield, CA 93301	Contact's E-Mail Address: krausek@co.kern.ca.us
Size of the organization: 62 departments	Number of employees: 9,126
http://www.co.kern.ca.us/clerk/minutes/bosagenda/PublishedMeetings.htm (integration with Granicus)	

Date Solution was implemented:

Phase 1: 12/1996 – 6/1997, Phase 2: 12/2001 – 1/2001

In late 1996 Questys Solutions, Inc. won a competitively bid contract to implement imaging technology at the office of the Clerk of the County Board of Kern County. The objective of the system was to provide a County-wide solution for archival and retrieval of Board Agendas and related backup documents, including ordinances, resolutions, staff reports and other attachments to agenda items. Upon issuance of the Authorization to Proceed, Questys Solutions purchased and configured equipment and operating system software and installed the system in January 1997.

During the training program Questys Solutions consulting staff realized that the County intended to use the system both as an archival/retrieval solution and as a tool for development of new agendas. Pursuant to this discovery, Questys Solutions analyzed the agenda process and determined that the County Board met three times per week for 50 weeks per year, and that an average weekly agenda packet consists of some 6,000 pages. Questys Solutions further determined that agenda packets were required to be completed five (5) hours before agenda posting time, and the County expected to scan, recognize, import, edit and archive the 6,000-page packet prior to agenda posting. Kern is currently running on ECMx, LSx, and the Granicus Integration Module. The rest of County Departments are in the process of upgrading.

REFERENCE #3

Firm/Government Agency Name: County of Tulare, CA

Contact Person (name and title):

Edward Frankovic, Questys Project Mgr.

Michelle Baldwin, Clerk of the Board

Contact's Phone:

(559) 636-4864

(559) 733-6271

Company Address:

2404 West Burrel Avenue

Visalia, CA 93277

Contact's E-Mail Address:

Efrankovic@co.tulare.ca.us

MBaldwin@co.tulare.ca.us

Size of the organization: 63 departments

Number of employees: approx. 4,000

Agenda Web Publishing Site: <http://bosagendas.co.tulare.ca.us/> (integration with Granicus)

Date Solution was implemented:

March 2004

The County switched from Laserfiche and IBM (FileNet) to Questys in 2004. Laserfiche and FileNet were unable to meet the County's agenda and workflow requirements.

The County system represents an enterprise-wide implementation of Questys® ECMx, WFX, LSx®, Capture, Microsoft Integration, Questys Connect, and Questys Web Server™. The first department that was implemented was the Clerk of the Board Office. The system is used for the scanning of document backlog and annual additions, automated generation of Board Agendas, document archiving and retrieval, version control, retention management, business process re-engineering and workflow, and other document management functions. Questys Solution is the County-wide ECM solution of choice. Many departments are using Questys such as Sheriff Dept, Assessor's Dept, TulareWorks EEDD, Environmental Health, Public Works, with the most recent add-on of Redevelopment Agency. County is running ECMx and is about to bring on the Children Welfare

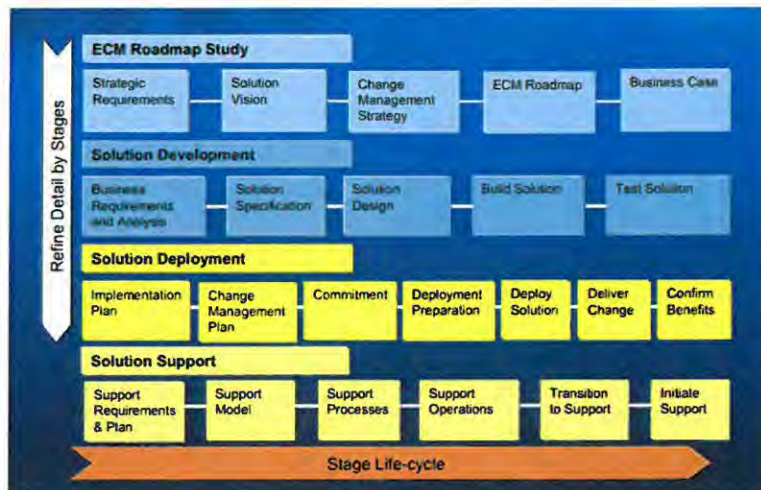
Department.	
REFERENCE #4	
Firm/Government Agency Name: County of Merced, CA	
Contact Person (name and title): David Bedker, IT Mgr.	Contact's Phone: (209) 385-7507 x4377
Company Address: 2222 M Street, Room 6 Merced, CA 95340	Contact's E-Mail Address: dbedker@co.merced.ca.us
Size of the organization: 45 departments	Number of employees: approx. 2,000
http://www.co.merced.ca.us/	
Date Solution was implemented: Spring of 2001	
<p>The County of Merced system represents an enterprise-wide implementation of Questys® ECMx, WFX, LSx®, Electronic Signature and Questys Web Server™. Currently, the system is implemented in the Clerk of the Board's Office, Department Attorney, Public Defender, Mental Health, ADS, Public Works, Probation, and more. The system is used for the scanning of document backlog and annual additions, automated generation of Board Agendas, document archiving and retrieval, version control, retention management, business process re-engineering and workflow, and other document management functions. The system is currently being expanded by the Information Systems Department to other County departments.</p>	
REFERENCE #5	
Firm/Government Agency Name: County of San Joaquin, CA	
Contact Person (name and title):	Contact's Phone:
Company Address:	Contact's E-Mail Address:
Size of the organization: 43 departments	Number of employees: 6,093
Date Solution was implemented: in 2001, went County- Wide 2006	

SECTION 5: CLIENT REFERENCES

Client Name	Project Name	Go-Live Date	Client Manager	Project	Contact Phone Number
City of Anaheim, CA	http://www.anaheim.net/ *ECMx, LSx agenda, WFX workflow, Web and Granicus integration	2004	Linda Andal, City Clerk landal@anaheim.net		(714) 765-5166
City of St. Petersburg, FL	http://www.stpete.org/council/index.asp *ECMx, LSx agenda, Web, Integrations with several in-house applications, and Granicus integration.	2003	Sharon Welch, IT Dir. Sharon.welch@stpete.org		(727) 893-7544
City of Yorba Linda, CA	http://www.ci.yorba-linda.ca.us/~ci26/city-services/agendas/city-of-yorba-linda-streaming-media-archive *ECMx, LSx agenda, WFX, Web, integration with Permit Plus, and Granicus integration	2003	Marsha Brown, City Clerk mbrown@yorba-linda.org Mike Saunders, IT Mgr. msaunders@yorba-linda.org		(714) 961-7150 (714) 961-7158
Alberta Municipal Place	CMx and LSx	2008	Gary Williams, IT Dir. gwilliams@auma.ab.ca		(780) 431-4526
City of Laguna Hills	CMx, PRM Physical Records Mgt, Fast Form & Accutrack migration	1998	Peggy Johns, City Clerk pjohns@ci.laguna-hills.ca.us		949-707-2631

SAMPLE PROJECT MANAGEMENT METHODOLOGY

Questys manages its projects by means of an integrated project management system based upon the **Cost/Schedule Control Systems Criteria (C/SCSC)**. The system is named Liquid Planner and it is the best application on the market for technical project management. These concepts represent the foundation of Questys' Quality Program. In summary, Liquid Planner <http://www.liquidplanner.com/> defines integrated project management as the process of applying the project management functions to project variables over the life cycle of the project. The project management functions include those of **defining, planning, monitoring and controlling**, while project variables entail the **scope, responsibility, schedule and cost**. The project management functions are applied to project variables at two levels, summary and detailed. In the case of projects with longer duration, the C/SCSC requires that the effort be subdivided into phases and managed by means of a "rolling wave" technique. The following paragraphs provide a brief overview of C/SCSD-based project management and explain how it is used on Questys' major projects.



As the first step in planning, Questys defines the project work by means of a **Work Breakdown Structure (WBS)**, a family tree-type structure subdividing the project into its component parts. This



Figure D-4: Sample WBS

subdivision will continue up to the level where the project components can be precisely defined in terms of the scope of work associated with their development and the requirements the component should meet.

On this project, the terminal level components will include hardware items, software modules and service tasks necessary to meet the requirements defined in RFP Scope of the Program.

Where appropriate, the project WBS is extended to a level of detail appropriate for configuration management. This structure represents the Product Configuration Baseline and serves as a baseline for the systematic control of changes to the identified configuration for the purpose of maintaining product integrity and traceability throughout the product life cycle.

As the **second step**, the project participants are organized in a Project Organization Structure (POS). The POS will include the Client and all contractors, and it will define their organizations to the level where the work is actually done. This organizational level is reached when the responsibility for the terminal level WBS element defined in step 1 can be assigned to a single organizational unit.

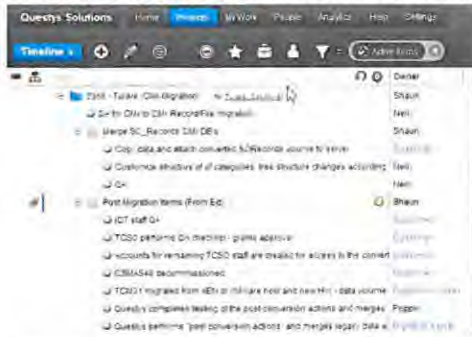


Figure D-5: Sample POS



Figure D-6: Sample RAM

As a **third step**, the WBS and the POS are combined into a Responsibility Assignment Matrix (RAM) and work tasks assigned to the organization units. The RAM will then be used as the basis for the development of the Milestone Schedule and Project Budget. The start/completion dates and budgets established by these documents will establish the constraints used for the planning of individual tasks. This methodology will assure the precise definition of the project and the compatibility of the summary and detailed plans.



Figure D-7: Sample Task Plan

As the **fourth step**, Questys will assemble the WBS, POS, RAM, Milestone Schedule and Project Budget into the Summary Project Plan and review the same with the Client. The Plan will be revised to incorporate the Client's comments. Copies of the plan will then be distributed to Task Managers to serve as the basis for the development of detailed Task Plans. If required, Questys will also hold a one-day seminar to familiarize Task Managers with C/SCSC planning and control techniques.

As the **fifth step**, Task Managers will prepare individual task plans. This will be accomplished by:

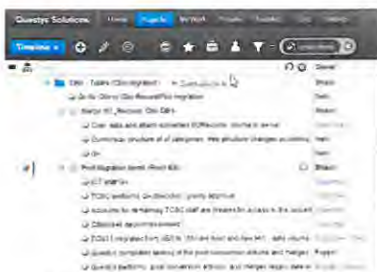


Figure D-8: Plan Integration

- Identifying the activities making up the task
- Defining task objectives, requirements and completion criteria
- Specifying the budget for each activity
- Developing a task schedule
- Time-phasing of the activity budgets
- Computing the Performance Measurement Baseline (PMB)

Task PMB's will be used as the basis for the reporting of the task status, computation of "earned value" data, variance analysis and control of task scope, quality, schedule and budget.



Figure D-9: Status Report

As the sixth step of the process, Questys will computerize Task Plans and summarize Task PMB's through the WBS and the POS to create PMB's for higher level elements and the entire project. In addition, Questys/Client/Task Managers will hold a series of meetings to reconcile the task scopes, schedules and budgets with the Summary Project Plan, and revise the summary/task level plans accordingly. The finalized plans then will be assembled into a Project Implementation

Plan to define the formally authorized scope, schedule and cost. These initial baselines will be controlled through the course of the project.



Figure D-10: Sample VAR

The project monitoring and control process will begin at the outset of the project. This process includes monitoring of the actual product configuration, the status of work and expenditure of project resources. Work hours and costs expended are recorded as they occur to compute the Actual Cost (AC). The status of each activity will be measured against an activity budget to determine the Actual Progress (AP) of the task. These two variables, along with the corresponding value of the PMB, representing the Planned Cost and Progress (PCP)

will be used to compute the Cost Variance ($CV=PCP-AC$) and Schedule Variance ($SV=PCP-AP$) for the task. The cost and progress data will be summarized through the WBS and the POS to determine the status of the overall project. The earned value of work accomplished during each period will be used as a basis for monthly billings to the Client.

In the event that the actual product configuration differs from the Project Configuration Baseline, and if cost and schedule variances at any level of the planning hierarchy exceed predetermined thresholds, a formal Variance Analysis Report (VAR) is prepared. As a minimum, the VAR contains:

- Description of the variance and identification of causal factors
- Effect of variances on the work element and the project
- Proposed corrective action(s) and changes to baselines
- Authorization/denial of the proposed change

Variance Analysis Reports are reviewed by Questys' Project Manager to determine if re-planning of the project is required. If re-planning is required, it is performed using the same techniques employed in the development of the original plan.

SAMPLE PROJECT ROLES AND RESPONSIBILITIES

Customer Responsibilities

The City is responsible for the following and will assume the following roles during this project.

Project Sponsor: The Project Sponsor is a senior administrator within the organization who has the authority to approve the use of Customer resources and make decisions on behalf of the organization as it relates to this project. Specific responsibilities include:

- Champion the project
- Accept responsibility for problems/issues escalated by the Project Manager
- Review and approve (sign-off) deliverables during the course of the project.

The following person will serve as the Project Sponsor for this project: City of Naples

Department Subject Matter Experts: Members of the City of Naples will participate in the implementation of the Questys application by providing business domain knowledge for process and work flow design/verification, configuration settings, and user acceptance testing. Staff from the various City departments will provide business domain knowledge appropriate for their areas and use of the system.

Customer Project Resources: The project will utilize resources as needed from both the City departments and IT groups to perform technical and analytical tasks normally associated with the deployment of a system. The City resources will perform tasks associated with their roles as defined by the project plan.

QUESTYS Responsibilities

Engagement Manager: The Engagement Manager is a senior executive within the organization who has the authority to approve use of Questys resources and make decisions on behalf of the organization as it relates to this engagement. Specific responsibilities include:

- Overall responsibility for engagement success
- Ensures all Questys Technology project practices and quality procedures are followed

Escalation point of contact for escalation of issues above the project manager level, in conjunction with project sponsors.

Project Manager: The Project Manager is the focal point for defining the needs of the project and ensuring the project objectives are reached. It is expected that Questys Project Manager will work closely with City throughout the project. Specific responsibilities include:

- Managing Questys portion of the project scope, schedule, and task assignments.
- Coordinating the review of completed project deliverables.
- Provide weekly project status communication to Customer on a regular basis.
- Participating in status meetings
- Coordinate resources to address issue/ task log items
- Provide Engagement Reports / Daily Schedules for Questys resources will fulfill the role of Project Manager on behalf of Questys for this project.

Development and Implementation Resources: Questys project resources will be assigned to perform technical and analytical tasks normally associated with the deployment of a system. Questys resources will perform tasks associated with their roles as defined by the Questys Project Manager.

Project Manager

Project Organization

- **Project Sponsor:** The person or group providing financial resources, in cash or in kind, for the project.
- **Account Executive:** Individuals responsible for the project scope
- **Engagement Manager:** The Engagement Manager is a senior executive within the organization who has the authority to approve use of Questys resources and make decisions on behalf of the organization as it relates to this engagement. Specific responsibilities include:
 - Overall responsibility for engagement success
 - Ensures all Questys Technology project practices and quality procedures are followed
 - Point of contact for escalation of issues, above the Project Manager level, in conjunction with Project Sponsors.
- **Project Manager:** The Project Manager is the focal point for defining the needs of the project and ensuring the project objectives are reached. It is expected that Questys Project Manager will work closely with Customer throughout the project. Specific responsibilities include:
 - Managing Questys portion of the project scope, schedule, and task assignments.
 - Coordinating the review of completed project deliverables.
 - Provide project status communication to Customer Project sponsor and team.
- **Stakeholders:** Individuals and organizations actively involved in the project, or whose interests may be affected as a result of project execution or project completion.
- **Subject Matter Experts:** Individuals with expertise about systems or processes required to complete the project and/or make it successful.
- **Administrator:** Individual responsible for becoming expert in Questys' use, and to administer the Questys product suite and act as first-level support for end users.
- **Technical Support:** Individuals with expertise about the system being implemented.

Questys				
Project Directory / Roles and Responsibilities	Assigned Role	Email	Phone	Comment
Account Executive	Esther Byrd	ebyrd@questys.com	877-362-6246 x2030	
Project Manager Subject Matter Expert	Dylan Tan	dylan@questys.com	877-362-6246 x3190	
Subject Matter Expert Migration	Poppin Chantarasompot	poppin@questys.com	877-362-6246 x3100	
Subject Matter Expert Installation / Training	Esther Byrd	ebyrd@questys.com	877-362-6246 x2080	
Technical Support Post Implementation	Donald Morales	Donald@questys.com	877-362-6246	

<i>Customer</i>				
Responsibilities	Assigned Role	Email	Phone	Comment
<i>Project Sponsor</i>	TBD			
<i>Project Manager</i>	TBD			

SAMPLE: TRAINING AND KNOWLEDGE TRANSFER

Questys Solutions will develop a training program and train City staff in all aspects of system operations and management as stated in the RFP. Questys Solutions will develop training materials for end-users and technical-support users. Documentation will be provided in hard copy and in Word format on CD/DVD. To minimize project cost we offer a single training program consisting of a number of sessions focusing on specific aspects of system setup, operations and maintenance.

There is no limit to the class size, providing the space provided by the Client can accommodate the students. Specific number of training sessions has not been determined for each department. Remote training been included with this project. Additional training hours/days can be purchased if necessary.

The training sessions are outlined below but will be customized for each department.

System Administrator Training (approx. 2 hrs)

1. *Database generation*
2. *System backup*
3. *System restoration*
4. *Replicating databases*
5. *Server install and maintenance*
6. *On click client install (CMx)*
7. *Web browser set up (LSX, WFX)*
8. *Email notification set up (LSx, WFX,)*
9. *WFX designer install*

Security Management Training (approx. 2 hrs)

1. *Security management (adding/removing users)*
2. *Permission definitions*
3. *Creation of Document Category*
4. *Creation of Forms*
5. *Creation of Index Fields*
6. *Best Practices*

CMx Document, Content and Records Management (approx. 4 hrs)

Basic

1. *Overview of General Interface*
2. *Creating Folders*
3. *Dragging in files*
4. *Creating records*
5. *Using Fields*
6. *Using Database Lookup (if applicable)*
7. *Using Auto filing*
8. *Scanning*
9. *Annotations*
10. *Redactions*
11. *Single File Import*
12. *Lock/Unlock*
13. *Deleting Records*

Advanced

1. *Revision Control (Check-In/Check-Out)*
2. *Shortcuts*
3. *XPS/TIFF Printer*
4. *Batch Lock/Unlock*
5. *Batch Import*
6. *Batch Scanning*
7. *Barcode Coversheets*
8. *File Restore*
9. *Clearing Questys Recycling Bin*
10. *Microsoft Office Integration (email import)*
11. *Using Fast Forms*
12. *Best Practices*

CMx Document, Content and Records Management Search Training (approx. 1 hr)

1. *Browsing*
 2. *Field Searches*
 3. *Full Text Searches*
 4. *Combination Searches*
 5. *Annotations/Redactions*
 6. *Printing Records*
 7. *Emailing Records*
-
1. *LSx: Make minor modifications to existing agenda templates*
 2. *LSx: Best Practices*
-
1. *Make changes to backup materials and staff reports*

Workflow Management (approx. 2 hrs)

*Must attend ECMx Content Management Training session

1. *Overview*
2. *General Reviewers/Approvers Functions*
3. *Project Management Functions (track and manage projects)*

Electronic Signature

1. *Overview*
2. *General User Functions*
3. *Security and Signature Set-up*

Fast Form (E-Forms)

1. *Overview*
2. *General User Functions*
3. *Design Form Templates*

Optional Training Sessions: Can be purchased at anytime

1. Architect Training including Advanced Auto-filing, DB Look, folders Hierocracy design
2. Importing Utility Scripting
3. Capture Scripting
4. Workflow Templates Design
5. Full 2-ways integration with in-house applications using Questys Connect
6. Agenda/Minutes Template Customization

MAINTENANCE AND SUPPORT

Questys Solutions Software Support & Upgrade Agreement

This Software Support & Upgrade Agreement ("Agreement") is entered into by and between Questys Solutions (hereinafter referred to as "QUESTYS SOLUTIONS") and [CLIENT NAME] (hereinafter referred to as "Client"). The parties hereto mutually agree that the provisions herein shall apply to the Questys software purchased from QUESTYS SOLUTIONS or its distributors/resellers and in consideration of the charges as set forth herein and on the Order Form that is attached to this Agreement.

A. TERM AND FEE

1. The Agreement shall commence on [START DATE] ("Commencement Date") and continue for a twelve (12) month period ("Agreement Term"); 3 years with two (2), 1-year renewal options.
2. The initial term of this Agreement shall be for one year from the Commencement Date, subject to the early termination provisions of this Article A.
3. QUESTYS SOLUTIONS may have 30-days to terminate this Agreement or any license upon written notice if Client breaches this Agreement. Termination of this Agreement shall not limit either party from pursuing any other remedies available to it, including injunctive relieve, nor shall such termination relieve Client's obligation to pay all fees that accrued prior to such termination.
4. The fees listed in this Agreement do not include taxes. If QUESTYS SOLUTIONS is required to pay sales, use, property, value-added, or other federal, state or local taxes based on any licenses granted in this Agreement, the provision of services hereunder, or on Client's use of QUESTYS SOLUTIONS software, then such taxes shall be billed to and paid by Client. This shall not apply to taxes based on QUESTYS SOLUTIONS's income.

B. RESPONSIBILITIES OF QUESTYS SOLUTIONS AND EXCLUSIONS

This Agreement specifically excludes the following:

- a. Cost of any and all hardware and third party (non-QUESTYS SOLUTIONS developed) software.
- b. The cost of repairs of any and all hardware and third party (non-QUESTYS SOLUTIONS developed) software.
- c. Installation of software upgrades, conversion of data, training of Client personnel or any other on-site or off-site professional services unless specifically outlined below and specifically related to the Questys Software Products. These additional services are available at standard QUESTYS SOLUTIONS billing rates.

"Response time" is defined as the period of time elapsed between the initial contact by Client personnel to QUESTYS SOLUTIONS and the acknowledgement by QUESTYS SOLUTIONS to Client that a support case has been opened. Response time is limited to, and counted in, hours available within the support periods defined elsewhere in this Agreement.

QUESTYS SOLUTIONS offers services at the following levels:

SILVER LEVEL

1. QUESTYS SOLUTIONS shall maintain the software in good operating condition and repair software malfunctions in a professional and responsive manner. Specifically, QUESTYS SOLUTIONS shall:
 - a. Provide software bug fixes as necessary.
 - b. Provide new releases of software manufactured by QUESTYS SOLUTIONS within sixty (60) days from official release. New releases will be made available as electronic downloads at no charge. Only QUESTYS SOLUTIONS developed software in new releases will be provided at no charge. Any additional third-party products that may be made available within the QUESTYS SOLUTIONS software will not be provided free of charge. These third-party products will be disabled in the QUESTYS SOLUTIONS software if the client chooses not to purchase them. QUESTYS SOLUTIONS guarantees a minimum of one new release annually.
 - c. Access to the Questys Online Knowledge Base.
 - d. Unlimited e-mail, online, and phone technical support for users and administrators with a response time no later than 5:00 PM on the next available business day, provided that the initial request is received during the available support period of 8:00 AM Pacific Time to 5:00 PM Pacific Time, excluding weekends and QUESTYS SOLUTIONS holidays (the "Silver Level Support Period"). The response time guarantee is calculated from the time that the support request is received. If the support request is received outside the Silver Level Support Period, the response time guarantee clock begins at 8:00 AM Pacific Time on the following business day.

GOLD LEVEL

2. Client will receive all benefits of the SILVER LEVEL plans in addition to the benefits listed below:
 - a. Unlimited e-mail, online, and phone technical support for users and administrators with a response time not to exceed four (4) hours during the available support period of 6:00 AM Pacific Time to 6:00 PM Pacific Time, excluding weekends and QUESTYS SOLUTIONS holidays (the "Gold Level Support Period"). The response time guarantee is calculated from the time that the support request is received. The four-hour response time shall be limited to available hours within the Gold Level Support Period.

C. RESPONSIBILITIES OF CLIENT

1. Client equipment shall include hardware, software, and communications components necessary for remote communications and diagnostics.
2. Client shall notify QUESTYS SOLUTIONS's service personnel upon system failure by calling QUESTYS SOLUTIONS's service line at 877-QUESTYS SOLUTIONS-MAIN (877-362-6246) or e-mail to techsupport@questys.com.
3. Client personnel shall not perform maintenance or attempt repairs to QUESTYS SOLUTIONS supplied software except by prior written agreement with QUESTYS SOLUTIONS.
4. Alterations in or modifications to the QUESTYS SOLUTIONS software may not be made without prior written consent of QUESTYS SOLUTIONS.

D. DISCLAIMERS

QUESTYS SOLUTIONS'S OBLIGATIONS AND WARRANTIES UNDER THIS AGREEMENT ARE IN LIEU OF ALL OTHER WARRANTIES, EXPRESSED OR IMPLIED. IN NO EVENT SHALL QUESTYS SOLUTIONS BE LIABLE FOR SPECIAL OR CONSEQUENTIAL DAMAGES, INCLUDING LOSS OF PROFITS, REVENUE, DATA, OR USE, INCURRED BY CLIENT OR ANY THIRD

PARTY, WHETHER IN AN ACTION IN CONTRACT OR TORT, ARISING FROM THE PROVISION OF SERVICE HEREUNDER, EVEN IF THE OTHER PARTY OR ANY OTHER PERSON HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. LIABILITY OF QUESTYS SOLUTIONS IN ANY AND ALL OTHER CATEGORIES AND FOR ANY AND ALL CAUSES, INCLUDING BREACH OF ANY EXPRESS OR IMPLIED WARRANTY OR REPRESENTATION SHALL, IN THE AGGREGATE, NOT EXCEED ONE MONTH'S AVERAGE BILLING TO USER TAKEN OVER THE 12 MONTHS PRECEDING THE MONTH IN WHICH THE DAMAGE OR INJURY IS ALLEGED TO HAVE OCCURRED, BUT IF THIS AGREEMENT HAS NOT BEEN IN EFFECT FOR 12 MONTHS PRECEDING SUCH DATE, THEN OVER SUCH FEWER NUMBER OF PRECEDING MONTHS THAT THIS AGREEMENT HAS BEEN IN EFFECT.

E. GOVERNING LAW AND AMENDMENTS

This Agreement shall be governed by the laws of Collier County Florida and constitutes the entire agreement between QUESTYS SOLUTIONS and Client with respect to the furnishing of maintenance and/or support to QUESTYS SOLUTIONS software as defined in this Agreement. No provision of this Agreement shall be deemed waived, amended, or modified by either party unless such waiver, amendment or modification be in writing and signed by a duly authorized representative of the party against whom it is sought to enforce the waiver, amendment, or modification. In the event any provision of the Agreement is held to be invalid or unenforceable, the remaining provisions of the Agreement will remain in full force and effect. The waiver by either party of any default or breach of this Agreement shall not constitute a waiver of any other or subsequent default or breach.

The terms stated in this Agreement shall prevail over any conflicting terms in any purchase order or other instrument covering the services subscribed to as issued by Client.

F. NOTICES

All written notices pursuant to this Agreement shall be addressed as follows:

To QUESTYS SOLUTIONS: 2302 Martin, Suite 475, Irvine, CA 92612 Attn: Technical Support Manager

To Client: City of Naples, 735 8th Street S, Naples, FL 34102-6796 Attn: Patricia Rambosk, City Clerk

TECHNICAL SUPPORT

Annual Support renewals are required. Customer can upgrade their support at any time. Downgrades can only be done during the renewal period.

Questys offers services at the following levels:

SILVER LEVEL:

Questys shall maintain the software in good operating condition and repair software malfunctions in a professional and responsive manner. Specifically, Questys shall:

- a. Provide software bug fixes as necessary.
- b. Provide new releases of software manufactured by Questys within sixty (60) days from official release. New releases will be made available as electronic downloads at no charge. Only Questys developed software in new releases will be provided at no charge. Any additional third-party products that may be made available within the Questys software will not be provided free of charge. These third-party products will be disabled in the Questys software if the client chooses not to purchase them. Questys guarantees a minimum of one new release annually.

- c. Access to the Questys Online Knowledge Base.
- d. Unlimited phone, e-mail & online technical support for users and administrators with response time guarantee within 24 hours or by end of next business day. All support requests must be submitted via email or the online Support Case Management System.
- e. Unlimited e-mail AND phone, online, and phone technical support for users and administrators with a response time no later than 5:00 PM on the next available business day, provided that the initial request is received during the available support period of 8:00 AM Pacific Time to 5:00 PM Pacific Time, excluding weekends and Questys holidays (the "Silver Level Support Period"). The response time guarantee is calculated from the time that the support request is received. If the support request is received outside the Silver Level Support Period, the response time guarantee clock begins at 8:00 AM Pacific Time on the following business day.

GOLD LEVEL:

Client will receive all benefits of the SILVER LEVEL plans in addition to the benefits listed below:

- f. Unlimited e-mail, online, and phone technical support for users and administrators with a response time not to exceed four (4) hours during the available support period of 6:00 AM Pacific Time to 6:00 PM Pacific Time, excluding weekends and Questys holidays (the "Gold Level Support Period"). The response time guarantee is calculated from the time that the support request is received. The four-hour response time shall be limited to available hours within the Gold Level Support Period. Gold level clients receive an annual health check.

Questys Support Services team will serve as the primary contact point for system support issues. Intent Digital will provide on-site support (as necessary) to ensure that all operational issues are addressed. The team helps the professionals who rely on our products to quickly diagnose and resolve any technical issues that may arise during their use. Support Services prides itself on high-touch customer service and the efficient and effective resolution of any errors that arise during our clients' enjoyment of our products. Technical Support Services offers the following two levels of support, Silver Level and Gold Level support, based on client needs and location.

- Business Hours Technical Support Services - Questys Support Services team provides technical diagnosis and error resolution for our clients from 6 a.m. to 6 p.m. Pacific Standard Time, five (5) days per week. Point of contact for customer service and technical support:
- Telephone: 877-362-6246 option 3
- E-mail: TechSupport@questys.com

24x7x365 Technical Support Services - This optional offering provides the same coverage as above, but includes 24 hours/day, 7 days/week, 365 days/year response for clients with specific international or around-the-clock operational requirements.

SECTION 5 ECMX SOFTWARE SOLUTION

Questys offers ECMx, Enterprise content management system to meet the Enterprise-wide requirements, to include the Questys® Product Suite consisting of (1) WFX, Questys workflow management system, (2) LSx, Questys automated agenda management system, (3) Questys Capture, (4) Electronic Signature, and (5) Questys Web Public Portal and Full Function web Modules, (6) Fast Form, (7) e-Forms, (8) Microsoft Integration Module, (9) Questys Connect, (10) PRM Physical Records

Management, along with requisite hardware and system software. ECMx is scalable and has capability to capture the City’s information in all formats whether electronically created or paper-based; reduce the amount of storage required for paper documents and use the technology to improve workflow in daily operations. The solution is available as a Cloud or on premise.

Questys ECMx Tools		Content Management	Capture & Imaging	Records management	Workflow	E-Form	E-Signature
Phase	Departments Business Process Assessed in the IT Strategic Plan						
Phase I Pilot							
	Description						
City Clerk	Agenda Process		X	X	X	X	X
Planning	Permitting / Code Enforcement		X	X	X	X	X
Water & Power	Work Orders		X	X	X	X	X
Information Technology			X	X	X	X	X
Questys Services and Support	Best Practices		X	X	X	X	X
Phase II							
Finance	Budget Process		X	X	X	X	X
City Manager/Purchasing	Issue Tracking/BID Management		X	X	X	X	X
Public Health	Immunization / Food / Vector Inspection		X	X	X	X	X
Fire Dept.	Emergency Response / Fire & Code Inspections		X	X	X	X	X
Human Resources	Personnel Action Form		X	X	X	X	X
City Attorney	Civil Lawsuits / Prosecutions		X	X	X	X	X
Questys Services and Support	Best Practices		X	X	X	X	X
Phase III							
Police	Reports & Records / Asset Management		X	X	X	X	X
Housing	CDBG Process / Section 8		X	X	X	X	X
Transportation	Parking Permit Process / Traffic Invest. / Ops.		X	X	X	X	X
Public Works	Permit. & Inspect.		X	X	X	X	X
Library & Information	Services Statistics		X	X	X	X	X
Human Services and Recreation	Immunization Program		X	X	X	X	X
Questys Services and Support	Best Practices		X	X	X	X	X

Figure 11 – Questys ECMx Tools

Following is a brief summary of the current components comprising the solution.

Questys Product Suite

Questys plays an important role in helping organizations of all sizes save time and money by increasing the productivity and efficiency levels of its employees. The Questys suite of products is designed to manage, store, organize, collaboration, and retrieve information. Questys is your complete enterprise content management solution.

Questys Enterprise Content Management (ECMx) — Electronic Document, Records, and Content Management

Questys is an integrated records and content management system capable of storing, collaboration, and managing physical and electronic documents. Its functionality spans several technological areas: Imaging, Data Recognition, Document Management, Records Management, Security and Data Portability. Questys features open system architecture and it can be integrated with all SQL database managers and in-house applications. It uses standard PC components, which provides for simple and inexpensive maintenance. It supports automated text recognition and index generation, and it is very economical to operate. Its modular design facilitates economical system expansion. *Available as a CLOUD or On-premise solution.*

Questys Workflow (WfX) — Automated Business Process Management

Standard workflow engine designed using the Microsoft workflow foundation, to manage projects such as processing and approval of agenda items, permit applications, requisition, contracts, purchase orders, invoices, vacation requests and the like. Typically, these projects entail a small number of tasks of short duration, and do not require sophisticated scheduling, monitoring and reporting. The system is also integrated with MS Project. It provides a full spectrum of project management functions, including scheduling, critical path analysis, resource management, resource leveling, status reporting, variance analysis and more.

Questys LegisStream® (LSx) — Automated Legislative Agenda Management

LSx is an automated legislative agenda management system designed to elevate the business of developing and processing legislative agendas, actions and associated documents to unprecedented levels of effectiveness through the creation of a paperless or near-paperless legislative process. The system operates on Windows-based servers and workstations; it is integrated with MS Outlook and MS Office, and is compatible with a variety of technical environments. While the system was developed to address the agenda process management for legislative bodies, LSx is equally well suited to agenda management at corporate entities.

Questys Capture

Easily input information into Questys ECMx with data entry automation and indexing that easily integrates with other applications. Questys Capture (Capture) offers more sophisticated data entry automation techniques and is capable of generating document indexes based on barcode recognition, form recognition, text parsing, third-party database lookups, directory names, file names, dates, times and other advanced file naming and indexing techniques. The standard package includes one of the leading optical character recognition engines and an extremely accurate barcode recognition subsystem. Text parsing, hand-printed character recognition and optical mark recognition engines are available as an option. All recognition products can be used both manually and in conjunction with Questys Capture.

Questys Web

The Questys Web is available in two options; (1) Public UNLIMITED Web Search and (2) Full Web Functions for staff use. The web provides users with secure access to their documents from anywhere in the world via the Internet or Intranet. Web gives you all the document creation, search and retrieval capabilities as the Questys Base Server.

Questys Digital Signatures

A digital signature provides the greatest possible assurance of both signer authenticity and document authenticity, with the least possible expenditure of resources. Adobe Reader version 10 or later is required at each signee's workstation. If required a certificate of authentication can be acquired for a solution and annually per signature rate.

Questys Mobile iPad Web Access

- Manage agenda items in meetings:
 - Review the agenda packet, take roll call, Vote on agenda items and
 - Take confidential notes
- Browse & Search documents and view videos:
 - Securely Search, retrieve, and view documents,
 - Print documents to AirPrint printers

Questys Microsoft Integration

Users can easily store their MS files, emails along with attachments and web browser web content directly into Questys similar to the "save as" function.

Questys General Data Importer

The Questys CMx Import Utility tool allows you to perform mass imports of data (and optionally files) into your Questys CMx system from any ODBC/OLE DB data source.

Questys E-Forms

E-Form will allow Customizable forms fit right into a website or portal for City staff and/or public users — can complete and submit information effortlessly. Once the forms are created, workflow can be initiated to automatically route the forms through the process for review, edits and approval/signoff.

Questys Fast Forms

For organizations that have pre-printed forms or in any organization that requires clients, employees, or vendors to fill-out and/or sign hard copies of forms, the Fast Forms feature can dramatically improve the input process by generating the form for print and automating the filing of the form in the Questys CMx repository. Additionally, **Fast Form** can be incorporated with E-Forms to create barcode on the generated form that requires additional information or wet signature on hardcopy of forms. With the barcode recognition technology, the system will automate the scanning and storing process of the completed forms.

Contract Management

Securely store, access and manage contracts anywhere in the organization. Easily monitor and ensure performance, help control spending, mitigate risk and enforce compliance, and maximizing benefits.

Questys Electronic Faxing (*optional*)

Inbound and outbound document distribution solutions are integrated into Questys CMx and include: desktop fax, production fax, e-mail-to-fax, broadcast fax, and web fax.

Granicus Integration (optional)

Simplify your video stream process. With a simple mouse click, LSx will export the complete agenda packet to Granicus for the duration of the meeting use. After the meeting, just import the recorded motion, votes, roll call, and links to the video back into Questys to generate the minutes for publishing, archiving, and searching.

Streamline your Legislative meeting process with one-click integration for a powerful combination of agenda management tools, enriched with Voting and streaming video experience.

With a simple Click, LSx will export the agenda, Council/Board members' information to be used during the meeting process. Once the meeting is completed, with one click, LSx will generate the minutes to include the roll call, motions, and votes along with the tabulations of the votes. The minutes can then be published to the public website and stored in CMx for searching. It will make your Granicus even better.

Legislator Members Tracking (optional)

Easy to use tracking system which enables the ability to: track the complete history of active and past Council members.

SECTION 5.1 ECMX HARDWARE /PERIPHERALS

Questys ECMX Typical Configuration Diagram: Questys Solutions' products are highly scalable and can grow to meet practically any organization's needs. System configurations vary greatly from small, standalone environments to large, enterprise-wide implementations and does not requires any proprietary hardware or 3rd party software.

ECMx Configuration Diagram

Typical Configuration

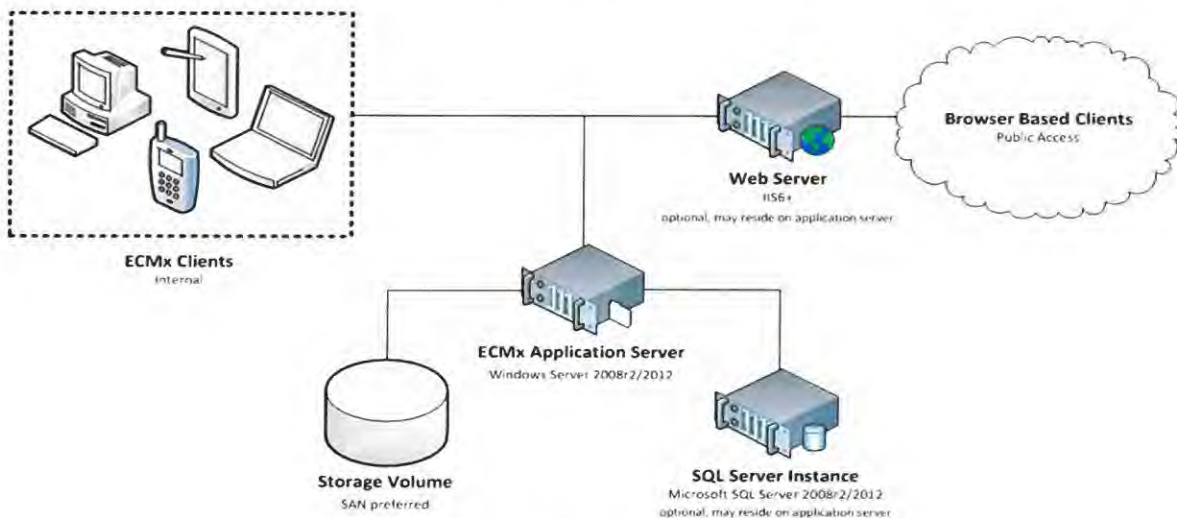


Figure 12: ECMX Typical Configuration

SECTION 5.2 SAMPLE NETWORKED CONFIGURATION:

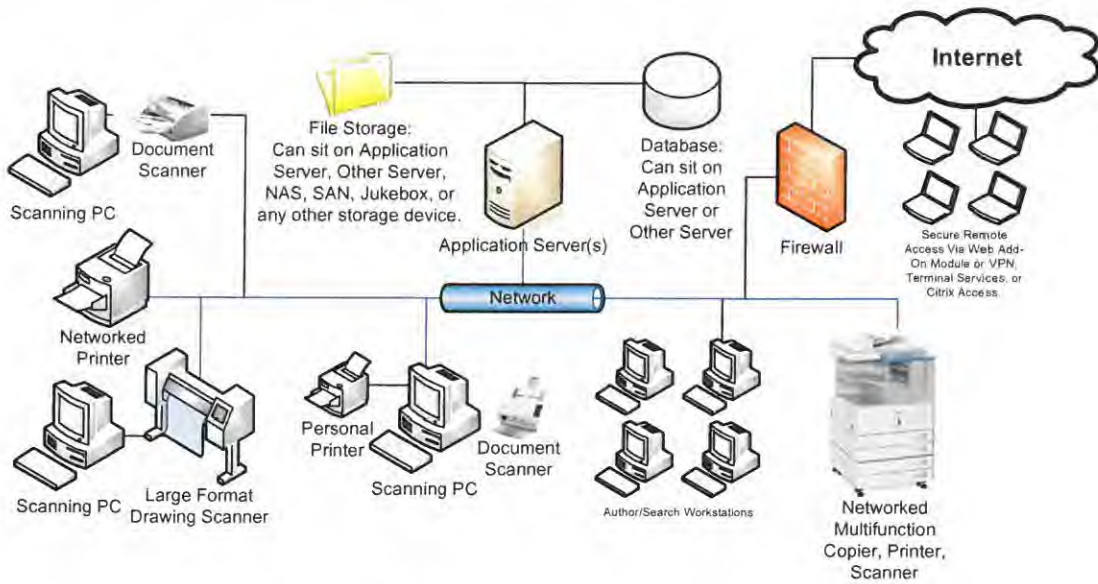
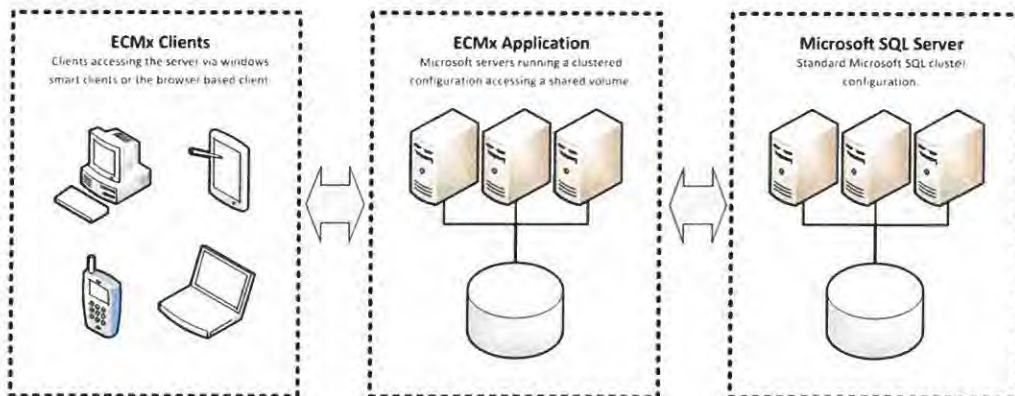


Figure 13: Sample Networked Configuration

The proposed configuration features an advanced hybrid storage system and optical disk drives or jukeboxes. This storage technology is best suited to the City's needs because it offers virtually instantaneous document retrieval and total security of stored information. The City of Naples will be able to generate duplicate optical disks for off-site storage, which will render the system disaster-prepared.

The City's requirements are unclear as to whether the system should use existing server, jukebox and scanners or new hardware components. In the event the City decides to purchase new equipment, a preliminary specification of hardware and system software are denoted in the system requirement section of this RFP. The final specification will be developed in discussions with the City of Naples. At that time the City will also decide whether to install a single server or clustered servers.

High Availability Configuration Overview



Clients would access the virtual cluster name of the ECMx Application cluster. If the primary server in the cluster were to fail, one of the secondary servers would then be promoted to primary to provide seamless access to the myriad of available clients.

The ECMx Application cluster may also leverage the power and availability of a SQL cluster. Many organizations already have a SQL cluster in place for their critical data needs. ECMx would be able to leverage the existing infrastructure, enhancing the prior investment.

SECTION 5.3 SYSTEM REQUIREMENTS

ECMx Server Requirements:

Minimum Hardware Requirements

- Intel Core i5 processor
- 2GB RAM
- 2GB hard disk space, plus proportional space for user data

Recommended Hardware Requirements

- Intel Xeon-Class processor or equivalent
- 8GB RAM
- 3TB hard disk space (for at least 5 yrs of storage)

Software Requirements

- Windows Server 2003 (x86 only)/2008/2008R2/2012
- Microsoft .NET Framework 4.0
- Message Queuing Service
- Internet Information Services (IIS) 6.0 or higher

ECMx Server Optional Feature Requirements:

- Adobe Acrobat Reader is required if user would like to perform full-text search on PDF files with a text layer.
- Microsoft Office 2007 SP3/2010 SP1/2013 is required if user would like to perform full-text searches on Office files.

Questys ECMx Client Requirements:

- Intel Core Duo or better CPU
- 1GB RAM minimum, 4GB recommended
- A screen resolution of 1024x768 or higher
- Microsoft Windows XP SP3/Vista/7/8
- Microsoft .NET Framework 4.0 (.NET 4.5 is required for WFX Workflow Designer)
- Microsoft Word and Excel 2007 SP3 or 2010 SP1 is required for LSx Agenda publishing
- Adobe Acrobat Reader version 10 or later is necessary at each signor PC for Electronic Signature
- A TWAIN or ISIS compatible scanner is required for scanning of documents.

Advanced Configurations:

- Microsoft SQL 2008R2 Express is bundled with the product, however another instance/version of SQL may be specified during installation. This SQL instance must be 2008 or higher with full-text services installed.
- Questys Web by default is installed on the local IIS server however a remote IIS server may be configured. This remote IIS server must also be running IIS 6 or later.

SECTION 6: ACKNOWLEDGEMENTS, ADDITIONS AND EXCEPTIONS

Why Questys Solutions

- Since 1981, Questys Solutions offers compelling easy to use, easy to manage, and easy to support turn-key solutions to meet City-wide requirements.
- Questys is the actual software developer and not a reseller. This benefits the City as the City will be dealing directly with Questys for the software, implementation, training, and on-going support. No middle man.
- With the corporate office located in Irvine, CA, Questys staff is only 1 hour away and can easily be at City site when necessary.
- The system is fully expandable. The City can expand and use the system for all City meeting types without additional cost to the City except the creation of the additional agenda/minutes templates. (Unless the City creates additional templates). The City may choose to also use the system to meet its Content Management needs without additional license purchase.
- Questys offers training to help the City to be as self-sufficient as possible. Questys is available to assist the City as much or as little.
- Questys has in-house software developer and technical team available to meet any of client's special requests.
- Granicus Partner since 2002
- In 1997, Questys developed one of the very first agenda management system and 1985 developed one of the first Document Text and Management system.
- Since 1981 specializing in working with government municipalities with hundreds of clients world-wide
- Quality Customer Care
 - FREE Online training classes
 - Training Videos
 - Access to the Knowledge Base
 - Annual User Group Meeting
- Future Value: (just to name a few)
 - Legislator Members Tracking Solution
 - Accounts Payable Automation
 - Contract Management Solution
 - Employee Management Solution
 - Video Streaming Services of Council Meetings
 - Touch Panel Voting System
 - Electronic Faxing

- MOST importantly, we understand the changing of processes and using new technology can be challenging. This is why, we will hand hold the City through the entire process and guide the City with the Best Practices, Do's/Don'ts, recommendations from what we have learned from other jurisdictions and will be here to support the City for years to come.

APPENDIX – AVAILABLE UPON REQUEST

Exhibit A - ECMS Technical Specifications

Exhibit B - Technical Feature Function Matrix

BROCHURES/LITERATURE

1-Questys Document Management Product Line Brochure

2-Questys Legislative Agenda Management – LSx

3-Questys Content Management – CMx

4-Questys Workflow – Wfx

5-Questys Mobile iPad Web Access

6-Questys Microsoft Integration

7-Questys Connect

8-Questys Capture

9-PRM – Physical Record Management

10-Fast Form

11-Digital Signature

12-Scanner Matrix

13-Production Scanner Matrix

WHITE PAPERS

14-Best Practices – Agenda and Legislative Management

15-Enterprise Collaboration Across Cities

16-Records Management Solution

17- ERP and ECM Interoperability

PRICING

City of Naples Clerk Module - Software As A Service

COST TABLE A: CMX SOFTWARE

No.	Item Description	Qty	Units	Unit Cost	Year 1	Year 2	Year 3	3 Year Total Cost
1	Questys CMx Document Management (1 department)	1	Each	\$5,999.00	Included	Existing	Existing	Included
2	CMx Document and Record Management Named User License (Twain Scanning Included)	8	Each	\$3,992.00	\$0.00	Existing	Existing	\$0.00
	Clerk Solution Module							
	-Document, Record and Workflow Process Management Solution							
	-Workflow for Clerk department Installation							
3	-Workflow simple (3 step) template installed	1	Each	\$14,999.00	Included	Existing	Existing	Included
4	Public Web Access Module	1	Each	\$9,999.00	Included	Existing	Existing	Included
	Existing Customer Discount - (\$34,989.00) Exp. 07/31/2016				\$0.00	\$0.00	\$0.00	\$0.00
4	Total Application Software			\$34,989.00	\$0.00	\$0.00	\$0.00	\$0.00
5	Questys SAAS Maintenance & Support GOLD AT SILVER LEVEL PRICE				\$6,298.02	\$0.00	\$0.00	\$6,298.02
6	Cumulative Maintenance & Support for Software As A Service				\$6,298.02	\$6,298.02	\$6,298.02	\$18,894.06
	Total Software Maintenance & Support for Software As A Service				\$6,298.02	\$6,298.02	\$6,298.02	\$18,894.06
	Optional Montly Payments							\$524.84

COSTS TABLE B: PROFESSIONAL SERVICES

No.	Item Description	Qty	Units	Unit Cost	Year 1	Year 2	Year 3	3 Year Total Cost
1	Install Questys CMX Application Software Standard VM Dedicated Customer VM - 1 CPU, 4 GB RAM Dedicated 50 GB Storage, 100 GB/mth transfer Minimum 50 GB/Month Backup Express SQL database will be installed	1	Each	\$2,000.00	\$1,100.00	\$0.00	\$0.00	\$1,100.00
2	Consult, Install, Configure, Clerk Solution Module	1	Each	\$2,000.00	Included	\$0.00	\$0.00	\$0.00
3	Workflow Simple Routing Template	1	Each	\$2,400.00	Included	\$0.00	\$0.00	\$0.00
4	Remote CMx Admin Training (1 hour)	2	Lots	\$600.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00
5	Remote USER Training (1 hour)	1	Lots	\$750.00	\$750.00	\$0.00	\$0.00	\$750.00
6	Project Management	1	Lots	\$1,000.00	\$750.00	\$0.00	\$0.00	\$750.00
	Professional Services				\$3,600.00	\$0.00	\$0.00	\$3,600.00

Total Project Investment \$9,898.02

\$22,494.06

Note: Projects costs may change if scope of project changes.

Payment Structure for the first year:

Month	Payment
Jul-16	\$524.84
Aug-16	\$524.84
Sep-16	\$524.84
Oct-16	\$8,323.50

Total \$9,898.02

We look forward to working with you on this project and helping your meet your organizational objectives.

Sincerely,

Esther Byrd
 Esther Byrd
 Sr. Solutions Manager



www.questyssolutions.com
 Email: esther.byrd@questys.com
 Phone: 877.362.6246 x2130



www.harriserp.com

Approved as to form and legality

By *Robert D. Pritt*
Robert D. Pritt, City Attorney

AUTHORIZATION

Signature below indicates Client's acceptance of this document.

Questys	City of Naples
Signature: <i>David A. Cole</i>	Signature: <i>[Signature]</i>
Name: David A. Cole	Name:
Title: Senior Vice President	Title:
Date: July, 7, 2016	Date: <i>7/13/2016</i>

COMPLETION SIGNOFF

Signature below indicates Client's acceptance of the completion of services outlined in this document.

Questys	City of Naples
By:	By:
Name:	Name:
Title:	Title:
Date:	Date: