

Date	August 26, 2014
Client	City of Gahanna
Project Name	Intellivue™ Enterprise Document Management Software Solution and Installation
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Overview:

City of Gahanna is considering the implementation of a document management solution in order to streamline processes for securely storing, indexing and retrieving all files and create greater efficiencies within all (10) departments of the city. The projects will be delivered in a phased approach. The (10) departments identified include Parks & Recreation, Police, Finance, HR, IT, Development, Mayor's Office, Service, Council and Court.

City of Gahanna has also expressed the need to convert 79 rolls of existing microfilm and 400 sheets of microfiche files into a digital format or tiff images for ease of storage and retrieval. Intellivue™ will provide a solution and format to scan, index, store and retrieve all current microfilm and microfiche documentation. The tiff images will also be passed through Intellivue's™ Full Text OCR tool to enable a Full Text Search of specific text on documents. (A proposal to provide this conversion has been sent separately)

City of Gahanna has identified the potential for tactical and strategic improvements with enhanced document management tools and policy.

Purpose and Description:

Intellinetics™ will implement, with City of Gahanna's assistance, an electronic document imaging/management system "Intellivue"™.

The system will utilize Intellivue™ Enterprise Document Management Software to capture, index and store all documents into Intellivue™.

By implementing the Intellivue™ Document Management platform, City of Gahanna will be able to:

- Reduce time and energy lost to document search / retrieval all documentation and information for all areas within the City of Gahanna.
- Automate the indexing and storage of scanned and faxed documents by utilizing Intellivue™.
- Minimize costs related to file storage
- Shrink document processing cycle time(s) through better workflow and collaboration
- Improve compliance through powerful security and auditing features
- Search for any missing documents from folders by utilizing the "AuditShield" Feature
- Increase disaster recovery capabilities through anytime / anywhere document access
- Reduce legal risk / exposure to document loss through fire / water / theft through security and audit features
- Improved internal and external service levels through anywhere / anytime document access

Solution and Approach:

Intellinetics™, working with City of Gahanna shall install and implement an Electronic Document Management System, Intellivue™, such that users will have the ability to scan all documentation within departments, index the documentation by, as example, Last Name, First Name, Date, SSN, and Address.

These index fields are configurable and will be finalized during project discovery meetings for each of the 10 departments within the city.

In order to automate the creation of electronic folders and provide auto-indexing of document Intellinetics™ will work with City of Gahanna to configure the capture of a csv. file from a line of business application or existing databases. The file will be captured and routed to a table that will be utilized by Intellivue™ for auto indexing of documents as they are scanned or added to Intellivue folders. APIs and Web Services are also available and will be utilized where available and applicable within each department. Additional details of this process will be determined during the discovery meetings.

Intellivue™- View of Imaged Document

The screenshot shows the Intellivue GX interface. On the left, a 'Folder Indexes' table lists fields like CONSUMER_NUMBER, LAST_NAME, FIRST_NAME, FULL_NAME, LOCATION, and ACTIVE_DATE. The main window displays a folder view for 'ADVISOR_CONSUMER' with a list of folders: BEHAVIOR PLANS (green), BENEFITS (red), DOCTORS ORDERS (red), INSURANCE INFORMATION (red), ISPS (red), MEDICATION ADMINISTRATION RECORD (red), and MUZ/UI (red). A detailed view of the 'Employee Time Sheet' document is shown, including a table with columns for Date, Employee Number, Employee Name, Employee Signature, Code, Start Time, End Time, Hour Units, and Explanation.

Sub-Folders that appear “green” are populated with documents. “Red” folders illustrate that they are empty.

The screenshot shows the Intellivue GX interface for 'ADVISOR_EMPLOYEES'. The 'Folder Indexes' table on the left lists fields like EMPLOYEE_NUMBER, LAST_NAME, FIRST_NAME, FULL_NAME, REGION, and HIRE_DATE. The main window displays a folder view with folders: BACKGROUND CHECKS (green), DISCIPLINES (red), EVALUATIONS (red), EXPENSE REPORTS (red), TIMESHEETS (red), and TRAINING REQUIREMENTS (red). A detailed view of an 'Enrollment Form' document is shown, with a red arrow pointing to the 'Notes' field. The document header includes 'UNUMPROVIDENT' and 'GROUP INSURANCE ENROLLMENT FORM'.

Notes can be added to documents and viewed only by those users with appropriate security.

Documents can be selected from the screen to be emailed, printed, faxed or saved to an external drive

The screenshot shows a software interface with a 'Notes' tab. A red box highlights the 'Notes' icon in the top toolbar, with a red arrow pointing to the text 'Print, Copy, Email, Fax'. Below this, an email composition window is open, titled 'Untitled - Message (HTML)'. The email body contains the UNUMPROVIDENT logo and a form with fields for 'Policy #', 'Employee Name (last name, first, middle initial)', 'Employee Address (street, city, state, zip code)', 'Policyholder Name', 'Social Security Number', and 'Date of Birth'. The 'Social Security Number' field is redacted with a red box containing the number '0'.

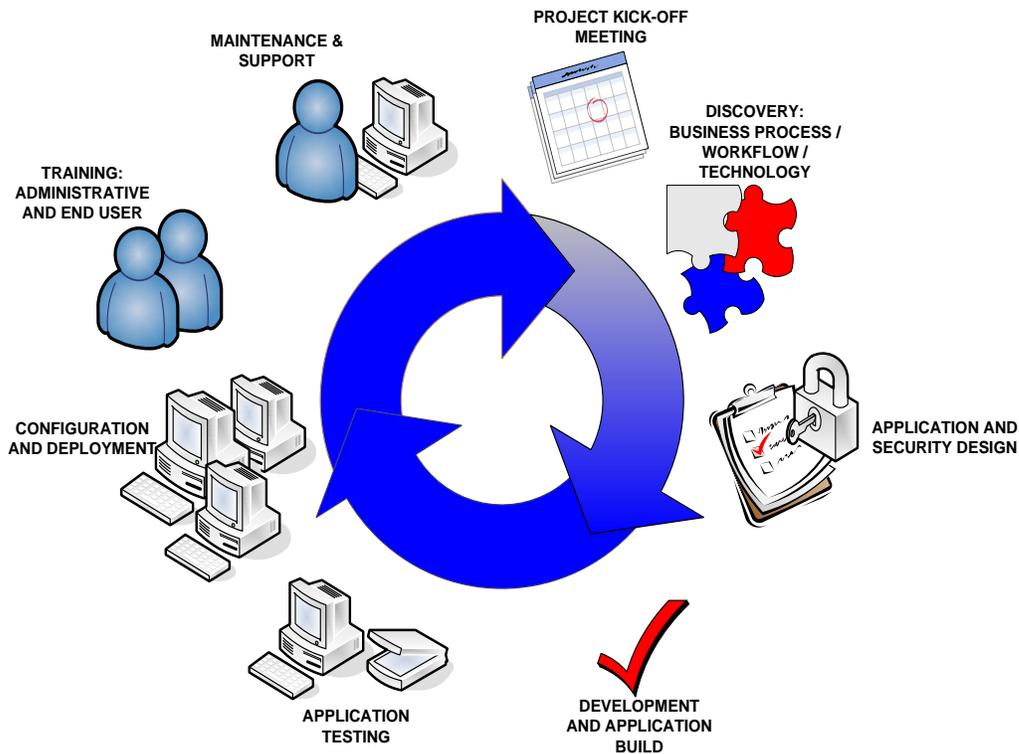
Sensitive Information can be "Redacted" or Hidden on Documents

The screenshot shows a software interface with a 'Folder Viewer' window. The folder viewer displays a list of folders and their contents. Below the folder viewer, a document titled 'Application for Employment' is displayed. The document contains a form with fields for 'Name', 'Address', 'Telephone #', 'Mobile/Beeper/Other #', 'Date of application', and 'Social Security Number'. The 'Social Security Number' field is redacted with a black box. The document also includes a section for 'Position(s) applied for' and 'Date available for work'. The page number 'Page 3' is visible at the bottom right.

Approach:

Intellinetics™ employs a project management approach to the implementation of Intellivue™. Intellinetics™ will work with the City of Gahanna Team to implement the Intellivue™ platform in a methodical manner, with approval at each step of the process.

Methodology



Our approach and methodology consists of the following project phases:

1. Discovery
2. Design
3. Development
4. Test
5. Deployment
6. Training.
7. System Maintenance and Support

Deliverables:

Intellinetics will install and configure the Intellivue™ document management software platform to integrate directly with a line of business Application in three areas for phase one. As part of this task, Intellinetics™ will perform the following subtasks:

- Setup the Intellivue™ Server Software for (5) Concurrent Users.
- Create applications for the first (2) of (10) Departments. (TBD)
- Create a security profile for the users of Intellivue™ within (2) Applications of (10).(TBD)
- Create applications for Property and Contracts to perform OCR and store the converted microfilm and microfiche images.
- Configure Intellivue™ to capture scanned documents from existing MFP devices currently owned by City of Gahanna. Documents will be sent into a designated drop- folder on the network and Intellivue™ will provide a tool to monitor the folder and sweep the documents into Intellivue™ Scan/Index queue. Details to be determined during discovery.
- Install (3) Intellivue™ scan stations.
- Provide End User, Scan Station/indexing, and System Administrative Training.

Assumptions:

- This will be a Premise based solution and reside on a customer supplied server at the customer's facility in Gahanna, OH.
- Customer will utilize an existing MS SQL- 2005, 2008, or 2012 database. No database software is provided. (Server Specs will be provided.)
- All areas utilizing Intellivue™ are on the same network and domain.
- Nightly backup will be performed by Customer using an existing Customer server-connected backup subsystem. No new backup software or hardware will be included.
- The majority of the work can be performed remotely by Intellinetics™.

Client Responsibilities:

- City of Gahanna will provide a project point of contact to work with Intellinetics™ in the implementation of Intellivue™.
- City of Gahanna will provide Intellinetics™ access to the appropriate systems, staff, and information necessary to perform the services outlined in this Proposal.
- City of Gahanna will provide Intellinetics™ with workspace, if required, at City of Gahanna offices for purposes of implementation of Intellivue™.
- City of Gahanna will provide remote access to Intellinetics™ and the SQL server where Intellivue™ will be remotely installed configured, integrated with Infallible Software and tested.
 - Remote access can be via VPN tunnel or via a secure remote access tool such as LogMeIn Rescue using HTTPS 256-bit SSL encryption.
- City of Gahanna will provide an IT resource with complete working knowledge of existing MFP device(s) to set up needed network folder to select and direct scanned images.
- Review and sign off on SMA (Software Maintenance Agreement) and SLA (Software License Agreement) before software can be loaded on City of Gahanna server.



Intellinetics™ Responsibilities:

- Provide project management and related support needed to bring solutions on-line.
- Provide access to all needed modules of the Intellivue™ platform.
- Provide end-user, scan station and System Administrative Intellivue™ training.
- Provide comprehensive helpdesk support.
- Maintain timely and accurate project communication, written and verbal, to ensure the Project Team is aware of project status at all times.
- Work with the Project Lead to resolve any concerns and/or changes to the scope of this implementation.
- Configure and install all software in accordance with this proposal.
- Any services or deliverables not listed as Intellinetics™ Responsibilities are out of scope for this project.

Training:

Intellinetics™ will provide a combination of webinar and on-site training classes at the customer's facility. We will provide three distinct classes: User training, Scan/Validation Training, and Admin Training.

The User Training will focus on general use of the system. It will cover topics such as searching, viewing, printing, notes and annotations.

The Scan/Validation training will focus on the use of the scan subsystem. This includes operating the scan software and the related screens for Quality Assurance and data validation.

System Administrators will attend an on-site Sys Admin training session to learn all aspects of system configuration and change requirements.

City of Gahanna will also be provided complete system documentation for future user, scan station and Admin reference.

Pricing:

The table below provides pricing for Intellinetics™ to install Intellivue™ on a City of Gahanna's Server, Install and configure (Up to 3) Scanners and Scan Stations & MFP Devices.

City Government Package Pricing:

- 5 Concurrent Licenses - \$7,500
- 10 Concurrent Licenses - \$15,000

Purchase Option- Premise Based Solution

Software	Qty	Price
Intellinetics' Intellivue™ Platform Licensing – Contains all of the ECM Components. Shared License.	5 Concurrent User Licenses	\$7,500
MFP Scan Stations Software License- Provides scanning connections All MFP (Multi-Function Printers) will be configured to scan to a designated folder on the network where an upload service will monitor the folder and sweep the documents into Intellivue for indexing. (Further Discovery is Required) Intellinetics will set up the first (5) and will instruct City of Gahanna how to set up any additional scan stations.	1	N/C



**City of Gahanna
Statement of Work**

Intellivue™ Scan Stations Software License- Software that is loaded on the scan station computer and provides the scanning, and advanced clean-up of documents to be sent directly into Intellivue™. (City of Gahanna-Govt. Discount)	1 @ 2@ \$995 2 @ \$1,990 NC	\$995 \$1,990 -\$1,990
Intellivue™ Connector Software- Provides Seamless Automated Indexing of Documents into Intellivue™. Provides Database Lookup from the following database tables- RDA Link (Remote Data Acquisition) Link	1	\$1,500

Services	Qty	Price
<ul style="list-style-type: none"> Installation of Intellivue™ Software including: <ul style="list-style-type: none"> Intellivue™ Viewer and Documents can be launched, Indexed and Published(Emailed, Printed, Copied, or Printed) Configure Intellivue™ (2) Applications to be integrated with existing (2) Databases. Create Workflow for each Application Create a Retention Schedule for each Application Read, index and direct documents into Intellivue™ repository folders for retrieval. Full Text OCR Setup and Configuration for Property and Contracts to perform OCR and store the converted microfilm and microfiche images. User, Scan Station and System Admin Training.. Set-up drop folders for existing MFP Devices for scanning into Intellivue™ 		\$13,445 One Time Fee
Annual Maintenance and Support <ul style="list-style-type: none"> Includes support and software updates 	Billed Annually 20% of software costs	\$3,597
TOTAL		\$27,037

Each Additional Department that is added will be at a cost of \$5,995 for services to include discovery meetings, application creation, integration, workflow creation, testing, training (end user, scan station, and sys admin), and complete documentation.

Estimated Timeline:

(TBD)

Payment Terms and Milestones:

Premise Based Solution

100% of Software ,Maintenance, and 50% of services upon signing of Statement of Work, Remaining 50% of services due after signed acceptance of installed project.

Cloud Option

50% of Services upon signing of Statement of Work, Remaining 50% of Services and first monthly payment due upon signed acceptance of installed project.



City of Gahanna
Statement of Work

Terms: Net 30

Authorization and Acceptance:

I have reviewed this proposal in its entirety and agree to the scope and terms described. As an authorized representative of my organization, I authorize Intellinetics to begin the project as described.

Client Signature (City of Gahanna)

Date Signed

Client Printed Name & Title

Intellinetics Signature

Date Signed

Printed Name & Title

Minimum Server Recommendations to Support Intellivue GX™:

Component	Recommended
CPU – 1 Quad Core	2.0 Ghz or higher
Operating System	Windows 2003 R2 Standard Edition – 32 bit
Memory	4 GB or higher
Power	Redundant Power Supplies
Drive Space	*100 GB or higher- (file size is 50K for a single page scanned tiff document.)
SQL	SQL Server 2005 or 2008 Standard Edition
.NET Framework	.NET 3.5 Framework or higher
Microsoft IIS	Microsoft IIS 5.0 or higher
Internet Browser	Internet Explorer 6.0 or higher
DVD Drive	DVD+/-RW
Backup	Internal Tape Drive or External Backup Solution

Retrieval Workstation Recommendations:

Component	Recommended
CPU	1.0 Ghz or higher
Operating System	Windows XP or higher
Memory	1.0 GB
.NET Framework	.NET 3.5 Framework or higher
Internet Browser	Internet Explorer 6.0 or higher

Scan Station Recommendations:

Component	Recommended
CPU	2.0 Ghz or higher
Operating System	Windows XP or higher
Memory	1.0 GB
Display	19", 1024x768x256 colors
Network	10/100 NIC with proper protocols
Internet Browser	Internet Explorer 6.0 or higher
Scanner Interface Card Slot	Available Full Size PCI Slot

Administrative Matters:

Intellinetics Contract Framework

The Intellinetics contract framework includes the following key documents:

- Proposal or Statement of Work (SOW)
- Software License Agreement
- Master Support and Maintenance Agreement
- Optional Software Escrow Agreement
- Third Party Hardware and Software Warranty

Each agreement is explained in further detail below. Our experience has shown that this contract model successfully accommodates our client's interests and concerns that may arise not just during implementation but throughout the relationship.

Proposal or Statement of Work (SOW)

Upon receipt of a signed Proposal Acceptance a project manager and project team will be assigned to the project. Project work will officially begin upon the receipt of a Purchase Order from the client. The Proposal or Statement of Work outlines the project deliverables, project assumptions, client and Intellinetics responsibilities, and payment terms and milestones.

Software License Agreement

The Software License Agreement authorizes clients to perpetually use the software and must be signed and executed before physical implementation of hardware or software can be performed. A sample Software License Agreement will be provided upon request.

Master Support and Maintenance Agreement

Clients become eligible to participate in the Intellinetics Annual Maintenance program upon receipt of signed Solution Acceptance. Our annual program of software support and customer service provides direct telephone access to experienced system and application technicians. Any customer needs or system problems are handled promptly and directly. Intellinetics will correct software defects and assist authorized system administrators in identifying imaging procedural problems during system operation. Support response will be 8:00 AM to 5:00 PM, Eastern Time. Point releases of the Intellivue software occur occasionally and are included free of charge. These releases provide additional functionality and new features as necessary.

The Intellinetics Annual Maintenance Program is governed by a Master Support and Maintenance Agreement. This is a renewable agreement for access to Intellinetics technical support resources outlines this direct relationship between Intellinetics and the client. A sample Master Maintenance Agreement will be provided upon request.

The annual software support fee for Year One will be invoiced at proposal acceptance and the covered period is as follows:

- For projects started before the 15th of the month, the first year's maintenance begins on the first day of the month in which the project was started. For projects starting on the 15th of the month or afterwards, the first year's maintenance begins the first day of the following month.

Program fees for future years are billed 60 days in advance, payment due Net30 for the period covered.

Optional Software Escrow Agreement

Intellinetics will provide an annual source code escrow agreement as a part of this project if requested by the client. Intellinetics keeps current versions of all source code with a single escrow provider. Annual fees are paid by clients to cover administrative costs for access to copies of the Intellivue source code should it be required. A sample Software Escrow Agreement will be provided for review upon request.

Third Party Hardware and Software Warranty

Third party hardware and software, whether existing or purchased in conjunction with this system, is warranted and supported by the manufacturer for their specified period of time. Please refer to the manufacturer's warranty for specific terms and conditions.