



# CITY of NOVI CITY COUNCIL

**Agenda Item B**  
**April 19, 2010**

**SUBJECT:** Approval for the purchase and implementation of the OnBase Verity software module from ImageSoft, the City's document imaging integrator, in the amount of \$19,206.

**SUBMITTING DEPARTMENT:** City Clerk

**CITY MANAGER APPROVAL:** 

<b>EXPENDITURE REQUIRED</b>	<b>\$19,206</b>
<b>AMOUNT BUDGETED</b>	<b>\$6,890</b>
<b>APPROPRIATION REQUIRED</b>	<b>\$19,206 (To be included with 4<sup>th</sup> quarter budget amendment.)</b>
<b>LINE ITEM NUMBER</b>	<b>101-215.00-802.000</b>

**BACKGROUND INFORMATION:** The City's digital imaging system allows the Clerks staff to store and retrieve City documents for the purpose of record retention and responding to requests for historical documents requests. The legacy imaging system contained over one million documents and data could only be retrieved using text based searches. Those documents were imported into the current imaging system, OnBase. OnBase, uses an index based search function as a primary method of retrieving and producing requested information. In addition, there is a basic text based search feature that allows the Clerks to perform simple text searches. Consequently, if the data submitted into the system has a misspelled word or there is a question regarding the indexing of a document, it may be omitted when OnBase displays the results using its basic text search criteria feature. The Clerks department makes every effort to make sure they fully satisfy the client's, over-the-counter and FOIA requests. Therefore, with the basic OnBase text searching feature, they often perform multiple searches using different criteria to fulfill each request to ensure all data meeting the request is captured and provided as requested. This increases the response time for which the Clerks can fulfill documents requested.

The OnBase Verity module provides advanced full-text search capabilities using search methods that allow the user to quickly and easily locate specific data (hit highlight feature) within multiple documents stored within the digital imaging application. Text searches can be combined with OnBase keywords or date range searches to define and limit the documents returned. Various search methods can be used to locate the desired data, including word, typo, wildcard, thesaurus and fuzzy techniques. These search techniques are significantly faster than the basic text searches. The OnBase Verity module displays a hit list of documents that meet the search criteria for more efficient access to the documents. Additionally, the product can search MS-Word and Adobe PDF documents that have been imported into the document imaging system.

Without the OnBase Verity module added to the digital imaging system, we will see decreased response times and accuracy issues with respect to completion of the search.

The Information Technology Department will work with the digital imaging integrator to purchase the module and coordinate the implementation phase of this project.

**RECOMMENDED ACTION:** Approval for the purchase and implementation of the OnBase Verity software module from ImageSoft, the City's document imaging integrator, in the amount of \$19,206.

	1	2	Y	N
Mayor Landry				
Mayor Pro Tem Gatt				
Council Member Crawford				
Council Member Fischer				

	1	2	Y	N
Council Member Margolis				
Council Member Mutch				
Council Member Staudt				



<b>Statement of Work No.</b>	14
<b>Revision No.</b>	2
<b>Customer Name:</b>	City of Novi
<b>Project Name:</b>	OnBase Verity Integration
<b>ImageSoft Contact:</b>	Mike Hellebuyck

This Statement of Work is made and entered into by and between ImageSoft, Inc., a Michigan Corporation with its principal offices at 40 Oak Hollow, Suite 120, Southfield, MI 48033 ("ImageSoft"), and City of Novi with its principal offices at 45175 W. Ten Mile Rd. Novi, MI 48375 ("Customer"):

This Statement of Work ("SOW") is to be attached to and is hereby made a part of the Professional Services Agreement ("PSA") entered into by and between Customer and ImageSoft dated July 30<sup>th</sup>, 2007.

Unless otherwise specified, the products and services provided within this SOW are hereby added to and covered for the duration and under the terms of the System Maintenance Agreement (SMA) entered into by and between Customer and ImageSoft dated July 30<sup>th</sup>, 2007.

To the extent that any terms and conditions contained in the related PSA or SMA are in conflict with, or in addition to the terms and conditions of this Statement of Work, the terms and conditions of this Statement of Work shall control.

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## 1. Introduction

This SOW provides a cost estimate to deploy the OnBase Verity Search Engine to the existing OnBase solution so department users have an easy-to-use interface for quickly accessing documents in OnBase that may or may not have an associated indexing structure. Verity will allow the City of Novi to search across words or phrases located in the body of documents that were scanned using full text OCR. Verity also supports fuzzy, wildcard, stemming and thesaurus searching across supported documents in the OnBase repository. By adding the Verity integration many departments, such as Novi Clerk will have a fast and easy way to find documents in OnBase that currently do not support a common indexing structure.

ImageSoft will engage with the City of Novi to create a Functional Specification document. The information contained in this document will be based upon our understanding of the solution during the Business Analysis and Design phase. ImageSoft will create and deliver the Functional Specification to the City of Novi. In the event any process scope that is greater than what is contained within this SOW is discovered, ImageSoft will present to Novi the reasoning for the additional scope, and an estimate of the additional effort. Novi can then decide whether to add the work to the scope, through a change order, or to reduce the project scope to its original size.

ImageSoft will configure the Verity components to allow the Clerks Department to retrieve documents from the OnBase system.

## 2. Hardware

1. The City of Novi will provide existing document scanner/s and workstations for this deployment. No new hardware is included with this solution.

## 3. Software

### 3.1 *OnBase Batch OCR Server License*

The City of Novi will purchase and utilize OnBase Batch OCR and process new and existing documents to create a text rendition to be added and searched from a Verity collection. The process to migrate existing documents stored in OnBase and process them through Batch OCR will be identified during Discovery. This process may be manual, or ImageSoft may be able to create a custom query to search and process all documents that do not have a text rendition through Batch OCR.

### 3.2 *OnBase Full Text Indexing Server for Verity*

The City of Novi will purchase and utilize the OnBase Full Text Indexing Server for Verity to enable users to search across the content of the stored documents and provide a list of hits based search results. This server license seamlessly integrates with OnBase. Only one server license will be required. User licenses will also be required, see 3.3.

### 3.3 *OnBase Full Text Indexing Concurrent Client*

The City of Novi will need user licenses to access the Verity search collections. Each user that performs full text searching will require a valid Verity Full Text Indexing user client. For this implementation, ImageSoft recommends Concurrent Client so usage may be shared amongst City users.

### 3.4 OnBase Migration Tool for Verity

This tool is required to take existing MS Office and/or text searchable documents and allow them to be added and retrievable using Verity. Once enabled, management will be able to process all full text searchable documents from OnBase through the migration tool and the tool will add these documents to the corresponding Verity Collections, based on existing configuration.

### 3.5 Module Breakdown

The below module descriptions are intended to provide a brief overview of the intended purpose. A more comprehensive description of each of the modules can be found at [www.onbase.com](http://www.onbase.com). Detailed module information is available upon request.

Module Name	Part #	Description
OnBase Full Text Indexing Server for Verity	VTIP11	Provides integration with Verity to provide advanced Full-Text searches for words or phrases that exist within documents stored in OnBase. Supports fuzzy, wildcard, stemming and thesaurus searching
OnBase Migration Tool for Verity	VTIPM1	Provides a tool to convert from Microsoft Full-Text Indexing Server to Verity Full-Text Indexing Server. All data that resides in Microsoft Full-Text catalogues will be migrated to Verity Collections with this tool.
OnBase Batch OCR	OCIPW1	Provides a tool to batch process documents from the existing capture interface, creating a text (OCR) rendition of the document to be searched across in the OnBase or Verity collections.
OnBase Verity Full Text Indexing Concurrent Client	VTIPIC1	Provides the ability to retrieve full-text data stored in Verity Full-Text collections. Verity Full-Text can index OCR images, COLD text documents, Adobe PDF documents, Microsoft Office documents, WordPerfect documents, HTML documents and many others.

Deliverable: Software modules as defined above.

## 4. Professional Services

ImageSoft will procure and implement the OnBase Verity integration for the City of Novi. As part of this, ImageSoft will perform Discovery and create a Functional Specification document that outlines the deliverables for this solution. Once complete and sign-off granted, ImageSoft will assign a Project Manager and start the scheduling of resources to deliver the solution. Once the solution is delivered, and all existing OnBase documents have been processed through the Verity engine, ImageSoft will provide user acceptance testing and training to end-users so they are aware of all aspects of the Verity search engine. ImageSoft is estimating training for up to five (5) individuals at the City of Novi and will promote a train-the-trainer environment, such that additional training can be handled internally.

Additional information related to the above mentioned tasks can be found below.

## **4.1 ImageSoft Project Management**

ImageSoft will assign a Project Manager to manage ImageSoft staff assigned to the project. The ImageSoft Project Manager will work directly with Customer project manager and make a good faith effort to control and monitor the project such that both parties' needs are met.

Project Managers within ImageSoft are responsible for administering the activities within a project from inception to project closure. This includes activities such as:

- Developing the detailed ImageSoft project plan
- Following up with customers on requirements, milestones, deliverables
- Managing project scope and identifying items that fall outside of the scope of this SOW
- Coordinating the activities between the various stakeholders (customer, development team, installation team, testing team, sales, etc)
- Providing a single point of contact for project related inquiries (questions, issues, etc)
- Managing the risk and project log. Mitigating all issues and escalating as needed
- Ensuring projects are delivered under the triple constraint of: time, scope and cost
- User Acceptance Testing schedule and plan

### Assumptions:

1. Customer shall provide a qualified PM to manage Customer resources and to ensure that project stakeholders and subject matter experts are available as required and requested by ImageSoft.
2. Customer delays or non-responsiveness may result in additional service costs and delays in the project.

Deliverable: Project Management Services as described above

## **4.2 Business Analysis and Design (Functional Specification)**

The purpose of the Business Analysis and Design process is to clarify the scope of the project by defining how the Verity solution will function. The analysis is performed by reviewing the Customer's current as-is business process and then by discussing and reaching consensus on how Verity will be integrated. The business analysis shall focus on the integration of Verity and conversion of existing OnBase documents. This business analysis process shall consist of a series of meetings or discussions, which may be held either at Customer's site or ImageSoft's site.

As part of the process, ImageSoft will develop a Functional Specification document and present it to the customer for approval. The Verity solution is based, at least partially, on off-the-shelf software products and highly functional software tools and therefore the Functional Specification document may be limited in technical depth and detail. ImageSoft will lead the meetings and will discuss and document the following major topics:

- System Architecture
- Document Properties
- OnBase migration to Verity
- Verity Retrieval
- Installation and Rollout
- User Acceptance Testing
- Project Management
- Training

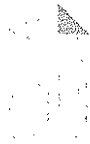
### Assumptions:

Image

1. Customer will ensure appropriate staff is available to address questions and participate in meetings for gathering information. Customer not providing appropriate staff in a timely fashion will affect the project schedule and may result in additional service costs.

Deliverable: Functional Specification Document





## **4.3 Installation and Configuration**

ImageSoft will install and configure the system for Customer per the agreed upon functional specification document.

### **4.3.1 Workstation Installation**

**Verity Concurrent Client Stations:** ImageSoft shall install the OnBase Verity client on up to three (3) clerk stations and provide knowledge transfer such that Novi IT staff can install all remaining as needed.

**Assumptions:**

1. All installation will be done at the customer's facility in Novi, MI.
2. Customer will provide all workstation computers, all of which are running the Windows XP Professional operating system. No workstation hardware is provided by this SOW.

**Deliverable:** Workstation setup as described above.

## **4.4 Disaster Recovery**

ImageSoft encourages Customer to implement a Disaster Recovery Business Resumption plan for their implementation. This SOW does not include services or software to be used for disaster recovery.

## **4.5 User Acceptance Testing**

Customer is responsible for final testing of the system prior to production rollout. ImageSoft will assist in this process by providing advice and by correcting system issues that are discovered during testing. A specific testing period will be defined where Customer will apply qualified and dedicated staff to user acceptance testing. The details of this process will be discussed and planned for by the project management team.

**Assumptions:**

1. Customer is responsible for the UAT plan and will send UAT Test plans to ImageSoft Project Manager prior to UAT training.
2. Delays in the user acceptance testing which are a result of Customer not applying appropriate resources to the task and which are not due to system issues, will increase services costs to the Customer.

**Deliverable:** ImageSoft assistance to Customer in performing user acceptance testing.

## **4.6 Production Rollout (Go-live)**

ImageSoft will assist Customer in the rollout of the final system into production. Production Rollout is a joint effort, and will require effort from Customer. ImageSoft shall apply only the amount of time and effort that is specifically identified in the pricing section of this SOW.

**Deliverables:**

1. Assistance with production go-live

## 4.7 Training

ImageSoft will provide training services within the amount of time identified in the Pricing section of this Statement of Work. The following training course will be provided.

<b>User Training:</b>	The User Training will focus on general use of the Verity system. It will cover the searching aspects of the Verity system.
Courses:	1
Training Materials:	Standard OnBase/Verity Client Help File
Course Duration:	2 hours
Max attendees per course:	5
Location:	Novi, MI

### Assumptions:

1. ImageSoft encourages a train-the-trainer approach. We recommend that Customer select one or more individual(s) to attend the training and develop an in-depth knowledge of the system so that future training needs can be handled internally.

Deliverable: Training as described above.

## 4.8 Documentation

No custom documentation is included with this SOW, other than standard OnBase documentation. If customer wishes to include custom developed documentation for the rollout of the Engineering Department, additional costs will apply and Customer should contact their Account Representative to inform of their desire to include such information.

## 5. General Assumptions

The following assumptions were made when preparing this Statement of Work. A significant change in any of these assumptions may affect the Work, Schedule and Cost.

- 1) Customer, at all times, during and after the performance of the Work, is responsible for maintaining adequate data backups to protect against loss of data.
- 2) Project success requires that Customer provide adequate user workstations, monitors, and operating system software.
- 3) Customer is responsible for providing adequate computer infrastructure required for operating and securing this system and the data. Such infrastructure includes, but is not limited to: power, networking, cooling, user PCs, and printers.
- 4) As part of Customer's responsibility for computer infrastructure, Customer is responsible for ensuring that data is secure and protected at all times. ImageSoft is not responsible for and cannot be held liable for inadvertent data disclosure or theft.
- 5) The system will be implemented at Customer's facility in Novi, MI.
- 6) Technical assistance from Customer's Information Technology staff will be provided during the performance of the Work. In particular, Customer will provide:
  - a) Network connectivity and troubleshooting assistance.
  - b) Ability to monitor network traffic and isolate bottlenecks.

- c) Technical assistance concerning the integration with existing Customer systems (if applicable).
  - d) Expertise to handle issues with printers, cabling, and PCs before, during, and after rollout.
- 
- 7) Unless otherwise specified, for third-party software, ImageSoft shall provide standard documentation in electronic form (on CD).
  - 8) Payment terms on equipment and software call for invoicing upon delivery. ImageSoft may have certain equipment and software delivered to an ImageSoft facility for staging and testing. For items received by ImageSoft, Customer will be presented with reasonable proof of delivery in order to release payment.
  - 9) The system being provided runs in a Local Area Network and Web environment. As such, the performance of the system is directly related to, among other things: available network bandwidth, network segmenting, and the performance of other applications. For this reason, ImageSoft can make no guarantees as to system response time.
  - 10) Supervised remote access to servers and/or workstation computers may be required during implementation and for support purposes once in production use.
  - 11) Hit-highlighting is supported in Verity, however not supported in .PDF text files, based on the proprietary nature of the viewer.
  - 12) Verity supports searching across TIFF (with OCR'd text), PDF (text rendition only) and MS Office Documents.
  - 13) Having hit-highlight in .PDF files will require Novi to view the PDF in a text viewer.
  - 14) Verity will display opened documents in the application specific viewer (MS Word, PowerPoint, etc)
  - 15) OnBase E-Forms are not supported in Verity Collections
  - 16) ImageSoft will work with the City of Novi to discuss how they wish to process existing OnBase documents through Batch OCR that do not have an existing text rendition. This may be a manual process, or a custom query and/or script may be required to automate. Additional costs for an ImageSoft created custom script would apply.

## 6. Pricing

### 6.1 Detailed Pricing

The table below provides pricing for the Phase I hardware, software, and estimated services.

<b>City of Novi, Michigan</b>				
				1/29/2010
<b>Novi OnBase Batch OCR and Verity Search Integration</b>				
<b>Hardware</b>				
<b>OnBase Verity Storage Server</b>				
Customer Provided		TBD	1	\$0
<b>Hardware Subtotal</b>				<b>\$0</b>
<b>Software</b>				
	<b>Product</b>	<b>Unit Cost</b>	<b># Units</b>	<b>Cost</b>
<b>OnBase Software</b>				
OnBase Full Text Indexing Server for Verity (provides integration with Verity to provide advanced Full-Text searches for words or phrases that exist within documents stored in OnBase. Supports fuzzy, wildcard, stemming and thesaurus searching)	VTIP11	\$10,000	1	\$10,000
Verity Full Text Indexing Concurrent Client	VTIPC1	\$300	3	\$900
Migration Tool for Verity (tool for migrating all Microsoft catalogues to Verity collections)	VTIPM1	\$3,000	1	\$3,000
Batch OCR Server	OCIPW1	\$1,500	1	\$1,500
OnBase Annual Maintenance and telephone support	OBMAINT	\$2,772	1	\$2,772
Less Hyland Discount (\$8,932)				-\$8,932
<b>Software Subtotal</b>				<b>\$9,240</b>
<b>Services</b>				
	<b>Product</b>	<b>Unit Cost</b>	<b># Units</b>	<b>Cost</b>
<b>Business Analysis and Design</b>				
Functional Specification Document		165	12	\$1,980
<b>Installation, Configuration &amp; Development</b>				
OnBase Verity Software Installation and Configuration		165	24	\$3,960

ImageSoft Customer Care Package (1 year), includes: - Version upgrade assistance - Custom Software Support - Configuration Support - Solution Upgrade Assurance - Access to Internal ImageSoft Resources - Advanced Architecture and Planning Support - Unlimited Telephone Support (See the Customer Care overview in the SOW for a detailed explanation of each component).				\$891
<b>Project Management</b>		165	12	\$1,980
<b>Production Rollout (Go-live)</b>				
Onsite Go-Live support		165	4	\$660
<b>Training</b>				
User training (on-site, train the trainer)		165	2	\$330
Admin training (on-site, train the trainer)		165	1	\$165
<b>Travel &amp; Expenses</b>			TBD	
<b>Services Subtotal</b>				<b>\$9,966</b>
<b>Total</b>				
<b>Grand Total</b>				<b>\$19,206</b>
<i>Pricing valid for 30 days</i>				

## 6.2 Payment Schedule

All payments will be due on a Net-30 day basis.

<b>Payment</b>	<b>When</b>	<b>Amount</b>
<b>Hardware &amp; Software</b>		
Down Payment (25%)	Invoiced when Project Signed	\$2,310
Equipment Balance (75%)	Invoiced on delivery	\$0
Software Balance (75%)	Invoiced on delivery	\$6,930
<b>Professional Services</b>		
Services	Billed every 2 weeks upon delivery	\$9,075
Customer Care	System Signoff	\$891
<b>Total</b>		<b>\$19,206</b>

### **6.3 Time and Materials Services**

ImageSoft has provided an estimate of the required services hours to complete the tasks described herein and will provide services on a time and materials basis. ImageSoft will only bill for the actual hours expended on behalf of the Customer and has made a best-estimate based on current available information. Estimates may require updating after the Analysis and Design process is complete.

A purchase order or signed agreement is required to be in place to cover all ImageSoft estimated hours. The Standard Hourly Rate is \$165 per hour.

### **6.4 Out-Of-Pocket Expenses**

Customer shall reimburse ImageSoft for all reasonable out-of-pocket expenses that ImageSoft incurs in performing the Work described herein. Out-of-pocket expenses shall include travel costs, meals, and lodging expenses and must be supported by proper invoices or other appropriate documentation.

Customer shall reimburse ImageSoft for travel time in excess of one (1) hour per day at an hourly rate equal to 50% of the Standard Hourly Rate.

## 7. Approval

Signature is required to accept this SOW. By signing below each party agrees to the proposed project scope and authorizes work to begin.

<b>Agreed to:</b> City of Novi, Michigan 45175 W. 10 Mile Road Novi, MI 48375	<b>Agreed to:</b> ImageSoft, Inc.. 40 Oak Hollow, Suite 120 Southfield, MI 48033
By: _____ Authorized Signature	By: _____ Authorized Signature
Date: _____	Date: _____
Name (type or print): _____	Name (type or print): <b>Scott Bade</b>
Title (type or print): _____	Title (type or print): <b>President</b>
Project name: <b>OnBase Verity Integration</b>	

<i>Internal Use:</i> Opportunity #: <u>000922</u>
Sales Order #: _____