



Travis County Commissioners Court Agenda Request

Meeting Date: September 30, 2014

Prepared By/Phone Number: Scott Wilson/854-1182

Elected/Appointed Official/Dept. Head: Cyd Grimes

Commissioners Court Sponsor: Judge Biscoe

Agenda Language: Approve Modification No. 8 to Contract No. 4400001068, ImageSoft Inc., for Imaging and Document Management System and Maintenance.

- **Purchasing Recommendation and Comments:** Purchasing concurs with department and recommends approval of requested action. This procurement action meets the compliance requirements as outlined by the statutes.

On August 21, 2012 Commissioner's Court awarded a contract to ImageSoft, Inc. for an Imaging and Document Management System for Travis County and the County Clerk's office, which included approval for all four (4) phases of the project. At this time Phase I has been completed and the implementation process for Phase II is under way. After an extensive review of Phase II, it has been determined that an additional software module called Public Sector Constituency Web Access is needed, which will allow the public to search and view documents that are available on public county websites. This Public Sector Access Software is part of the enterprise version; therefore, all county departments will be able to utilize this application programming interface (API) if they want their documents on a public county website.

Modification No. 7, approved by the Purchasing Agent on August 29, 2014, incorporated additional specifications for phase II into the contract.

Modification No. 6, approved by Commissioner's Court on July 8, 2014, added Clerk Review, Judge Signature Queues and ImageSoft TrueSign software.

Modification No. 5, approved by the Purchasing Agent on April 2, 2014, added Document Import Processor software and professional service implementation hours.

Modification No. 4, approved by the Purchasing Agent on March 3, 2014, allowed for the TrueFiling CourtRecordMDE and Indexing Automation interface component to be implemented within the Travis County network to accept filing requests from filers using the efile Texas.gov system and insert them into the OnBase system.

Modification No. 3, approved by the Purchasing Agent on October 29, 2013, granted Records Management and Juvenile Probation to OnBase Licensing.

Modification No. 2, approved by the Purchasing Agent on August 5, 2013, allowed for all Minute Traq documents to be protected so they cannot be modified in OnBase or interim storage.

Modification No. 1, approved by the Purchasing Agent on July 2, 2013, added the EDM Services Software Module.

➤ **Contract Modification Information:**

Modification Amount: \$19,300

Modification Type: additional software modules

Modification Period: August 21, 2014 through August 20, 2015

➤ **Funding Information:**

Funds Reservation: department creating a Funds Reservation

MODIFICATION OF CONTRACT NUMBER: 4400001068 for Imaging and Document Management System and Maintenance

ISSUED BY: PURCHASING OFFICE 700 LAVACA STREET STE 800 AUSTIN, TX 78701	PURCHASING AGENT ASST: Scott Wilson TEL. NO: (512) 854-9700 FAX NO: (512) 854-9185	DATE PREPARED: September 17, 2014
ISSUED TO: ImageSoft, Inc. Attn: Scott Bade 25900 W 11 Mile Road, STE 100 Southfield, MI 48034	MODIFICATION NO.: 8	EXECUTED DATE OF ORIGINAL CONTRACT: August 21, 2012
ORIGINAL CONTRACT TERM DATES: <u>August 21, 2012 through August 20, 2013</u>		CURRENT CONTRACT TERM DATES: <u>August 21, 2014 through August 20, 2015</u>

FOR TRAVIS COUNTY INTERNAL USE ONLY:
Original Contract Amount: \$716,797 Current Modified Amount: \$984,403

DESCRIPTION OF CHANGES: Except as provided herein, all terms, conditions, and provisions of the document referenced above as heretofore modified, remain unchanged and in full force and effect.

The above numbered contract is hereby modified as per attached Project Change Request to add an additional enterprise software module called Public Sector Constituency Web Access, which will allow the public to search and view documents that are available on public county websites. As a result of this Contract Modification, the above contract is increased by \$19,300.

Note to Vendor:
 Complete and execute (sign) your portion of the signature block section below for all copies and return all signed copies to Travis County.
 DO NOT execute and return to Travis County. Retain for your records.

LEGAL BUSINESS NAME: _____	<input type="checkbox"/> DBA
BY: _____ SIGNATURE	<input type="checkbox"/> CORPORATION
BY: _____ PRINT NAME	<input type="checkbox"/> OTHER
TITLE: _____ ITS DULY AUTHORIZED AGENT	DATE: _____

TRAVIS COUNTY, TEXAS	DATE: _____
BY: _____ CYD V. GRIMES, C.P.M., CPPO, TRAVIS COUNTY PURCHASING AGENT	

TRAVIS COUNTY, TEXAS	DATE: _____
BY: _____ SAMUEL T. BISCOE, TRAVIS COUNTY JUDGE	



Original Contract No.	4400001068
Change Order:	15478
Customer Name:	Travis County
Customer Contact:	Bob Trautman
Project Name:	OnBase Implementation – Phase 2 – Public Documents
ImageSoft Sales Contact:	Kevin Kowalkowski
ImageSoft Project Manager:	Moises Feliciano
Date:	July 21, 2014

Project Change Description

As part of Phase II for the existing OnBase EDMS implementation for the Travis County Clerk of Courts, the County would like to allow for documents to be placed on the public website for search and retrieval. Any documents made publicly available would have previously been processed through a redaction process to ensure any sensitive data has been removed from the file before posting.

When initially finalizing the contract, options to provide this functionality were discussed; however, it was left out of the initial scope. Through recent discussions between ImageSoft and Travis County, it has been determined that a simple website offering, that can be plugged into the existing Travis County website, is appropriate for the County for now. This website will provide similar functionality as the current website today with simple retrieval for Court Case documents (Civil, Probate, and Misdemeanor):

- ImageSoft will build the .NET-based web service layer built on the OnBase Unity Integration Toolkit in the County's local network and will provide all the necessary calls to the OnBase Application Server to search and retrieve PDF document renditions. The web service will exist on the Unity Client Application Server framework that exists today in the Travis County environment.

That web service layer will be called by the Oracle APEX-based website. ImageSoft will work collectively with Travis County technical staff to make changes and publish those changes to an Oracle APEX website environment.

A description of the changes are detailed in Appendix A of this document.

Scope

To implement the proposed Services, ImageSoft will undertake the following tasks;

- *ImageSoft will create the web service layer to make the appropriate calls to the OnBase system to search and retrieve publicly available documents based on the Cause Number of the currently viewed case.*

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- *ImageSoft will work with Travis County staff to implement that web service layer in the existing Travis County environment. Travis County will be responsible for using the APEX Wizard and ImageSoft will provide the web service location information to use in that Wizard.*

Assumptions

The following assumptions were made when estimating pricing for this project change request:

- *Travis County will provide the current APEX-based website source information and any necessary development environment components, licenses, etc. to make the appropriate changes.*
- *Travis County technical staff will work collectively with ImageSoft to connect the Oracle APEX website to the ImageSoft created web service layer by using the provided wizard-driven website control to be placed in the APEX website.*
- *Travis County will be responsible for any network connectivity issues between the Oracle APEX web site hosted in the Virginia data center and the ImageSoft provided web service interface hosted on the Travis County network.*
- *It was initially discussed to allow a more advanced level of access to mental health documents. For the time being, this has been excluded from the scope of this Public Document Search initiative.*
- *This functionality requires the OnBase Unity Integration Toolkit API license. This license has been proposed in a separate SOW Amendment that must also be executed in order to be used as part of this scope of work.*

Deliverables

- *ImageSoft will deliver a functioning web service interface to search and retrieve PDF renditions of documents based on passed in search criteria as defined in Appendix A of this PCR document.*
- *ImageSoft will provide a high-level document describing the methods available within the API Service Layer, their required parameter inputs, and response types and structure.*

Fees

For the work associated with this project change request, the estimated number of hours is increased by 60. Based on a standard service rate of \$155 per hour, the additional fees to the Client are \$9,300.

Additionally, the following OnBase software modules will be added to the contract as required for this initiative:

Premise Software				
	Product	Unit Cost	# Units	Cost
OnBase Software				
Public Sector Constituency Web Access	DSIPI1	\$10,000	1	\$10,000
	One-Time ImageSoft Software Discount			-\$2,000
OnBase Annual Software Maintenance	OBMAINT	\$2,000	1	\$2,000
	Premise Software Subtotal			\$10,000

Note - This functionality requires the OnBase Unity Integration Toolkit API software license. This license has been proposed in a separate SOW Amendment that must also be executed in order to be used as part of this scope of work.

Agreement

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

Each of us agrees that the complete agreement between us about these Services consists of 1) this Project Change Request, 2) the referenced Statement of Work including any previous mutually-approved Project Change Requests, 3) the Professional Services Agreement (“PSA”) and the System Maintenance Agreement (SMA) entered into by and between Travis County and ImageSoft.

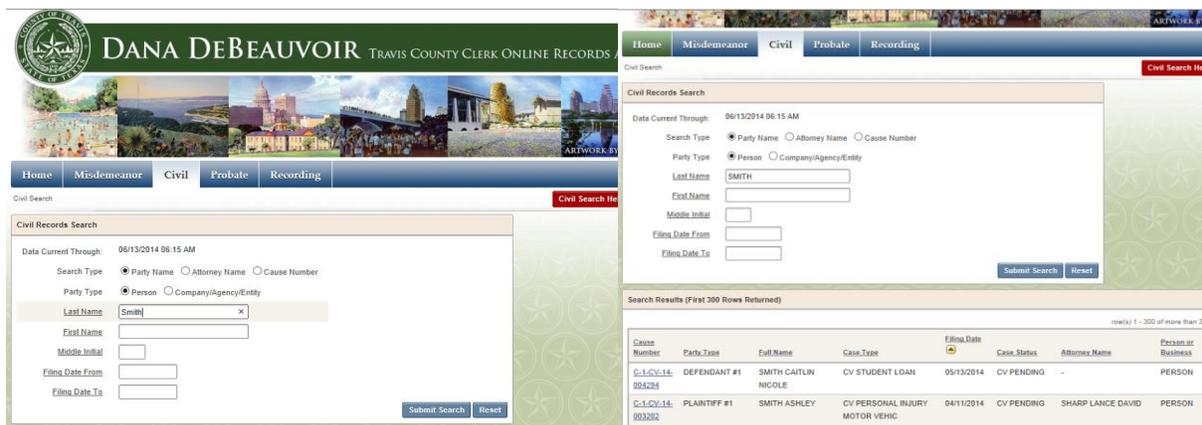
<p><i>Agreed to:</i> Travis County, TX 700 Lavaca Blvd. Austin, TX 78701</p>	<p><i>Agreed to:</i> ImageSoft, Inc. 25900 W. 11 Mile Rd., Suite 100 Southfield, MI 48034</p>
<p>By: _____ Authorized Signature</p>	<p>By: _____ Authorized Signature</p>
<p>Date: _____</p>	<p>Date: _____</p>
<p>Name (type or print): _____</p>	<p>Name (type or print): <u>Scott Bade</u></p>
<p>Title (type or print): _____</p>	<p>Title (type or print): <u>President</u></p>
<p>Project name: <u>OnBase Implementation – Phase 2 – Public Documents</u></p>	

<p><i>Internal Use:</i> Opportunity #: <u>15478</u></p> <p>Sales Order #: _____</p>

Appendix A – Solution Description

Civil, Probate, and Misdemeanor Court Case Documents will be made available for public search and retrieval for anyone who searches from the County website. Any documents types that are captured into the system that are noted as being “publicly available” will be available for public search and retrieval with no necessary account, credentials, etc. The search and retrieval of documents will be built into the existing APEX website as it works today. Currently, there are two websites within the County website. One is for searching Case data and the other is for searching Case documents. The new document search functionality will be exposed using the existing Case data search to provide a single, cohesive data and document search interface. The existing document search functionality will be deprecated by Travis County staff.

No changes will be made to the following screens for search and search result/case selection:



Once a case is selected from the above Case selection screen, the user will be directed to the Case Details Screen (Civil example shown below):



This screen will be altered to add a new list of documents below the “Party Details” list. This list will have similar fields (as shown below from the current “Document Search” website) but it will adopt the look and feel (style) of the “Case Data Search” site that it is being integrated into.

DOCUMENTS					
Document ID	Date Received	Document Type	Document Category	Document Desc	View
581824	11/05/2010	6142		PLD:CV LETTER TO CLERK	
607723	02/09/2011	3702		RET:CV EXECUTION RET EXECUTED	
609338	02/14/2011	6142		PLD:CV LETTER TO CLERK	

Clicking the ‘View’ button will open a separate window with the requested document delivered as a PDF document.



Dana DeBeauvoir *Travis County Clerk*

PO Box 149325, Austin TX 78714-9325 | **Phone:** (512) 854-9188 | **Website:** www.traviscountyclerk.org

September 16, 2014

TO: Scott Wilson, Purchasing Agent
FROM: Susan Bell
RE: Contract Modification for Imagesoft – Public Document Module

Please move forward expeditiously to prepare and place on the Commissioners Court agenda a contract modification with Imagesoft that will add a public access module. This module will allow the public to view documents on the web. This feature was in our original budget but was temporarily pulled out of the project phases until we could flush out the details. That process has been done, and we are now ready to move forward. Please note that this will also need to include an amount for professional services. These services provide coding changes to allow our current website to interoperate with this api interface.

This public access module is part of the enterprise version, therefore, all departments will be able to use this api interface if they want their documents on a public website.

We cannot go live without the public access portion available and online.

Your assistance is appreciated. Please let us know if you have any questions.