

**EXHIBIT A**  
**SCOPE OF SERVICES/PAYMENT PROVISIONS**

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**I. Service Delivery Site**

The service delivery site will be the Monterey County Records Retention Center, 1488 Schilling Place, Salinas, California 93905.

**II. Scope of Services**

The Information Technology Department, County of Monterey, (County) is purchasing the Questys Infolinx Records Management System. This system will provide a comprehensive records management product to meet County needs for implementation of the County-wide Records Management Policy established by the Board of Supervisors.

**CONTRACTOR shall provide the following:**

A. Infolinx Web Software License

1. Supports SQL 2005 or higher
2. Unlimited Tabs (Dataviews)
3. Unlimited Add-ons

B. User Licenses

1. Fifteen (15) Concurrent User Licenses
2. Six (6) Named User Licenses

C. Software Options

1. Advanced Retention/Disposition Module
2. Space Management Module
3. Billing Module
4. Import Data File Watcher

D. Third Party Integrations

1. Questys Integration

E. Professional Services

1. Review implementation deployment plan
2. Design and Configure dataviews
3. Design Initial Box, Location, User and File barcode black & white labels
4. Configure initial barcode scanner hardware
5. Set three initial security levels for admin, file room and end users (additional unlimited security levels can be defined and added).
6. Import initial item data from Advantage Legacy system.
7. Define the Data exchange Module during design and consultation phase.
8. Build and test daily import file (if Auto Import option acquired)

9. Install Infolinx Web software on Network Server during installation
10. Import data and verify RM system functionality prior to training.
11. Train Information Technology (IT) staff on configuration and set up
12. Train IT Operations and System Administrators on:
  - a. Administrative Functions (security, rights, design fundamentals)
  - b. File Room operational procedures (pick-list, check-in, check-out, transfers)
  - c. End Users procedures (login, logout, search, request)
  - d. Creation of ad-hoc reports, with timing, content, and frequency as specified by County
  - e. Manual and Quick Start guides
  - f. Standard and Advanced Query Procedures .
13. Produce generalized site-specific report templates

#### F. Professional Services Time Line

As used in this section, “day” means 8 hours, from 8am to 5 pm.

1. Seven (7) Days of Data Conversion
2. Two (2) Days of Application Configuration
3. Five (5) Days of Project Management
4. Sixteen (16) Hours Remote Installations
5. Two (2) Days of Training
6. Six (6) Days of Configuration
7. One (1) Day of Configuration Training

These times are estimates only. Questys will devote such additional time as is required to accomplish all tasks specified in this scope of service to County’s satisfaction, with determination of the completeness and adequacy of performance resting in County’s sole discretion. Exact days upon which the tasks and professional services specified in this scope of work will be determined by County in accordance with its business needs.

#### G. Bar Code Readers

1. Motorola MC3190 Portable Barcode Scanner Kit (one)

#### **County shall provide the following:**

- A. Assign a project manager, and back-up project manager, from the Information Technology (I.T.) staff to work with CONTRACTOR throughout the project.
- B. Provide access as necessary to 1488 Schilling Place, Salinas, Ca to CONTRACTOR.
- C. Provide on-site meeting space for project meetings.
- D. Web servers that meet the following requirements:
  1. Microsoft Windows 2008 Server or higher
  2. Microsoft Internet Information Server 7.0 or higher
  3. Microsoft .Net Framework 4
  4. 400 MB free disk space
  5. 256 MB RAM (1 GB recommended) for Infolinx, (not total ram on server).
- E. County Workstation Requirements
  1. Any modern browser, Chrome, Firefox, Safari or Microsoft Internet Explorer

- (9 or higher recommended)
  - 2. 256 MB of memory
  - 3. Monitors supporting 800X600 resolution or above
  - 4. Optional Barcode scanner requires an available COM port (or USB port with com to serial converter). Also requires Java 7 or higher, or IE (for ActiveX)
  - 5. Adobe Acrobat Reader (to view Microsoft Reports)
- F. Data Base Server
- 1. Microsoft SQL Server 2008 or higher
  - Oracle 9i or higher

### **III. Term of the Agreement**

The term of this Agreement shall be from October 1, 2015 to December 31, 2015, unless sooner terminated pursuant to the terms of this agreement.

### **IV. Payment Provisions**

- A For the services described in this Agreement, the maximum obligation of the County will be **\$116, 205.00**. The payment conditions as specified in Section 6 of the body of this Agreement shall apply
- B. Payment to be based on satisfactory acceptance of the completion of the project by the County following the installation, data conversion, application configuration, remote installation and training by the CONTRACTOR.
- C. There shall be no travel reimbursement allowed during this Agreement.
- D. Invoices shall be mailed to:
  - Monterey County Information Technology
  - 1590 Moffett Street
  - Salinas, Ca. 93905
  - Attn: Accounts Payable