



# County of Monterey

Board of Supervisors  
Chambers  
168 W. Alisal St., 1st Floor  
Salinas, CA 93901

## Board Report

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**File #:** A 20-123, **Version:** 1

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- a. Authorize and approve the Director of the Information Technology Department to execute Amendment No. 1 to the non-standard agreement with Questys Solutions for the provision of content management Microsoft Office Integration Module in the amount of \$12,935.00 for a total maximum amount not to exceed \$389,059.08; and
- b. Authorize the Director of Information Technology to sign up to two (2) amendments to this Agreement, extending the term by one (1) year each, where the additional costs per year do not exceed ten percent 10% (\$13,537) of the cost of the prior year, subject to County Counsel review, and provided that the terms and conditions of the agreement remain substantially the same; and
- c. Accept non-standard contract provisions as recommended by the Director of Information Technology.

### RECOMMENDATION:

It is recommended that the Board of Supervisors:

- a. Authorize and approve the Director of the Information Technology Department to execute Amendment No. 1 to the non-standard agreement with Questys Solutions for the provision of content management Microsoft Office Integration Module in the amount of \$12,935.00 for a total maximum amount not to exceed \$389,059.08; and
- b. Authorize the Director of Information Technology to sign up to two (2) amendments to this Agreement, extending the term by one (1) year each, where the additional costs per year do not exceed ten percent 10% (\$13,537) of the cost of the prior year, subject to County Counsel review, and provided that the terms and conditions of the agreement remain substantially the same; and
- c. Accept non-standard contract provisions as recommended by the Director of Information Technology.

### SUMMARY:

The Questys system is the County's enterprise Electronic Document Management System (EDMS) for electronic storage of files. County departments use this application to store, manage and retrieve electronic documents. The proposed Amendment would allow the County to purchase the Microsoft Office Integration Module, which allows user to streamline saving documents and emails within the Questys program.

### DISCUSSION:

The County uses Questys Digital Information Management System to automate scanning paper documents, import electronic files and e-mails, then OCR, edit, and store information in electronic format for instant retrieval. This application allows County departments to automate the document cataloging process and enable the upload of documents electronically for archiving and future access, while reducing the need for storage space previously necessary for paper file copies.

The recommended Questys Microsoft Office Integration Module allows easy access and storage of documents and emails into the Document Management repository without compromising usability. From within Microsoft Word, Excel or PowerPoint, users can create documents, and with a click of a button, they can save them into the Questys Document Management repository.

The Agreement is generated by Questys and does not have the standard County liability and indemnification provisions; however, the Agreement terms and conditions are standard in the software support industry and

meet the business operational needs of the County. As such, approval is recommended by the Director of Information Technology. The yearly support includes access to software fixes, new releases, online knowledge database access, and unlimited correspondence for technical support.

The approval of Amendment No. 1 will allow departments use of an advance Microsoft Office Integration feature for their business needs.

OTHER AGENCY INVOLVEMENT:

County Counsel has reviewed the software maintenance and support Agreement and cannot approve due to the following nonstandard terms: vendor right to immediate termination upon breach, warranty limitations, and limitations on amount and type of damages available to the County.

FINANCING:

The funds for payment of this Agreement have been included in the FY 2019-20 Approved Budget for the Information Technology Department, ITD 1930, Unit 8433, Appropriations Unit INF002. Transactions relating to future fiscal years will be included in each respective Recommended Budgets.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

The Microsoft Office Integration Module will allow users to save documents and email within the Questys

☐ Economic Development  
☒ Administration  
☐ Health & Human Services  
☐ Infrastructure  
☐ Public Safety

Prepared by: Sandra Shaffer, Management Analyst III, 759-3985

Approved by:

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Eric A. Chatham, Director of Information Technology, 759-6920

Attachments:

Questys Solutions Support Agreement  
Amendment No. 1 to Questys Solution Support Agreement  
Questys Exhibit A, Microsoft Office Integration Module order form

Attachments are on file with the Clerk of the Board