AM No. 12-20: AWARDING A SOLE SOURCE CONTRACT TO SIRE TECHNOLOGIES IN THE AMOUNT OF $59,459 FOR AN ELECTRONIC INFORMATION AND AGENDA MANAGEMENT SOLUTION AND $7,167 FOR ANNUAL SOFTWARE MAINTENANCE.

Agenda of: May 14, 20112   **Date**: May 3, 2012
Originator: Deputy City Clerk

Route to:	Department	Signature	Date
X	Finance Director		5/3/
X	Interim Deputy Administrator		5/3/12
X	City Clerk		5/4/12

REVIEWED BY MAYOR VERNE E. RUPRIGHT: _____

FISCAL IMPACT: ☒ yes or ☐ no   Funds Available   ☒ Yes or ☐ No

Account name/number/amount:

Software Acquisition	110-4181-499.45-09	$59,459
Software Maintenance Costs	001-4112-411.40-31	$ 7,167
		$66,626

Attachments:
    Sole Source or Non-Competitive Procurement Approval Request for Commodities (1 page)
    SIRE's Response to City's Scope of Work (60 pages)

SUMMARY STATEMENT: In the FY2012 budget $75,000 was appropriated for the purchase of an electronic records management software solution. In April 2012 the City Clerk's Office issued a scope of work to the purchasing agent for an electronic information and agenda management solution. Given the requirements provided within the scope of work, the purchasing agent has determined that sole source procurement is appropriate, as required by WMC 5.08.140. See the attached Sole Source or Non-Competitive Procurement Approval Request for Commodities for justification of this sole source purchase.

SIRE Technologies has responded to the scope of work and is able to meet the needs of the City. Their response is attached. It is expected that $59,459 will be paid in increments as milestones of the project are completed. The first payment is expected to occur in FY2012 and the remainder in FY2013. The annual maintenance cost will be paid out of the FY2013 budget.

STAFF RECOMMENDATION: Adopt AM No. 12-20.

Date: 5/14/12	Approved: ✗	Denied:	Initials:	Comments:

Department/Division making the request: Clerk's Office

Vendor Name: SIRE Technologies

Vendor Address: 2211 West 2300 South

Vendor City, State, Zip Code: West Valley City, UT 84119

Vendor Phone Number: +1 (801) 634-1896

Print Form

Sole Source or Non-Competitive Procurement Approval Request for Commodities

Description of commodities to be purchased: Electronic Information and Agenda Management Solution

What is the estimated cost of the commodities to be purchased? $59,459.00

Is installation required? ☒ Yes   ☐ No

If yes, explain the installation, who will be performing the installation and the cost: The Deputy Clerk, IT Network Support Specialist, Tekmate Contractor and SIRE employees will work together on the installation. SIRE's charges are outlined within the quote dated January 20, 2012.

Describe the unique requirements of this purchase: The City Clerk's Office needs a sole vendor who will supply an electronic records and agenda management software solution.

Describe the circumstances believed to justify a sole-source or non-competitively solicited commodity: SIRE Technologies specializes in the needs of municipal government. They are the only vendor who offers modules for electronic records and agenda management without any third party vendor involvement.

Describe the efforts or activities undertaken to identify other potential vendors: Over the last 8 years the Clerk's Office has researched potential vendors at international and state conferences. The Purchasing Agent and Deputy Clerk searched online for other potential vendors who would meet the sole vendor requirement; no other vendor was found who met the requirement.

I hereby request approval for the referenced vendor to be designated a sole source for the amount and term as described above.

Date 5/3/12

----------------------------------APPROVALS----------------------------------

Approved by Department Director/Manager: _[signature]_ for PxSmithers Date 8/3/12

Approved by Purchasing/Contracting Officer: _[illegible]_ Date

Approved by Finance Director: _[signature]_ Date 5-3-12

Please consider this form as my approval of your request. This exemption is granted pursuant to WMC 5.08.140, based upon information provided and is contingent upon the accuracy of such information. This exemption may be rescinded in the event reliable information becomes available upon which the Purchasing/Contracting Officer determines that the commodities sought may be obtained in a more efficient process. Approved by the Mayor:

[signature]

Date 5-4-2012

Electronic Information and Agenda Management Solution

SIRE Technologies, Inc. by AlphaCorp
2211 West 2300 South
West Valley City, UT 84119

Rick Haviland
Regional Sales Manager
801.634.1896
rhaviland@siretechnologies.com

The City of Wasilla
290 E. Herning Avenue
Wasilla, AK 99654
907.373.9047

Due: April 24th, 2012

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Project Overview

SIRE Technologies is pleased to submit our proposal for an Electronic Information and Agenda Management Solution to the City of Wasilla. SIRE's software is designed to function as an enterprise-wide solution, and each component is structured to work seamlessly in conjunction with one another, creating a complete product offering available from a single vendor. We develop, maintain and test our own products, giving the City the reliability, customer service and technical efficiency it expects.

We understand the City is interested in a one-step-at-a-time approach to implement both an electronic information management system as well as an agenda management solution. SIRE can help the City fulfill this goal with our modular, completely scalable system.

This powerful product suite is specifically designed for government agencies and dramatically reduces the costs of manually processing, storing, and retrieving their documents and information. At the same time, SIRE helps government agencies increase their productivity, profitability, and security.

With extensive expertise in the state and local government sector combined with previous experience working with government agencies such as the City of Wasilla, SIRE Technologies understands the challenges the City is facing. In fact, most of our clients have faced very similar issues, and have succeeded in not only solving these issues using our software, but also benefiting from numerous unexpected side effects our solutions provide. Our clients are not only streamlining their processes, reducing the amount of labor required to complete their work, and increasing public access to information – but they are also seeing tremendous benefits from paper savings, saved courier costs, fewer public information requests at the office, and synergies from automating processes not only in their departments but city, county, or state wide.

SIRE enables efficient, high- speed document imaging, distribution, controlled access, easy annotation and secures change management. SIRE offers an Electronic Information Management System, optimized to work across multiple sites, diverse applications and a variety of computing environments using standard networks for data exchange. Additionally, SIRE's agenda management solution is designed to function directly on top of SIRE's electronic document repository; giving users the ability to seamlessly work under one cohesive system.

Our functionality surpasses traditional high-end imaging solutions at dramatically lower cost. SIRE is an open MS Windows solution using industry-standard networks and Microsoft SQL or Oracle databases to integrate imaging with existing business applications.

The proposed system has the built-in capability to expand into an Electronic Information Management System using the base configuration of hardware and software. The application the City of Wasilla wishes to implement poses no high-risk areas to SIRE that cause reason for concern due to schedule deadlines, incompatible technologies, or overly tight specifications. SIRE approaches every project implementation with a System Design and Specification activity which will help ensure that the project is well understood by all parties and that all risk is well managed.

For more than two decades, SIRE's core focus has been on local and state government agencies. This has resulted in a deep understanding of the environment in which governments operate and the challenges they face related to compliance, budget, and politics.

Experience has taught us that sometimes our clients need only to streamline and automate existing processes. Others want to re-think the way they do business in response to new or changing ordinances, newly elected leaders, or departmental growth. SIRE's solutions are modular in design allowing us to affordably provide our customers with a fit that best suits their circumstances and needs. Yet our straight-forward pricing methodology, combined with products that contain a long list of standard features, provide our clients with the best value possible.

This is how SIRE will solve some of the major challenges the City of Wasilla is facing today:

Document Management Automation: SIRE automates a range of processes across the enterprise, including storage, retention, indexing, and workflow processes.

Improve Efficiency: Instant access to files from anywhere at any time combined with automated processes and procedures dramatically increases staff productivity, effectiveness, and overall efficiency.

Eliminate Paper: Paper-based systems make it extremely time-consuming to find and retrieve requested documents by hand. The growing number of documents being filed and requested in any office only intensifies this problem. SIRE allows users to easily store, index, retrieve, view, share, and edit paper and electronic documents used every day, thereby eliminating paper trails and the physical hunt for files and documents. Eliminating paper reduces the time spent filing documents away, as well as the time needed to retrieve them at any given point in time. Using SIRE as your electronic document management system allows you to significantly reduce physical storage space while rendering documents portable and remotely accessible for fast retrieval by multiple users simultaneously.

Achieve Cost Reductions: We have successfully solved issues of massive paper volumes, storage space, misplaced files, and document retrieval for our customers, thus saving them a great amount of labor hours and money. Improvements are also achieved through streamlined work processes, saving both time and money.

File Security & Compliance: With SIRE, different files can be assigned different levels of security in order to protect files with varying security needs and guarantee compliance with various rules and regulations, such as HIPAA, Sarbanes-Oxley, and the Patriot Act.

Volume: Through custom retention schedules and immediate file retrieval in SIRE, there will be no more need to store a massive amount of files or duplicates onsite once the backlog is entered into the system. Files can be retrieved from anywhere and by multiple people simultaneously. Automated retention schedules ensure the proper storage and purging of files that have reached the end of their retention schedule.

Improve Access: Through fast and easy file retrieval, SIRE will drastically reduce the time currently being spent on retrieving documents and completely eliminate the need for duplicates. The documents will eventually be accessible by all departments of the City of Wasilla and can be made accessible over the web to both staff and the public via any internet-ready PC. Access control dictates who has access to what documents, thereby ensuring confidentiality of files and activity restrictions where necessary.

Email Management: With proper e-mail policies in place, SIRE will ensure the automated and accurate storage of e-mails identified as records, including their attachments, while enabling controlled access to these records.

File Integrity: SIRE eliminates the need to search for missing or lost documents. Existing policies regarding public reviews of files can be strictly enforced through access control, which ensures that designated documents can be viewed and printed, if desired, but not modified.
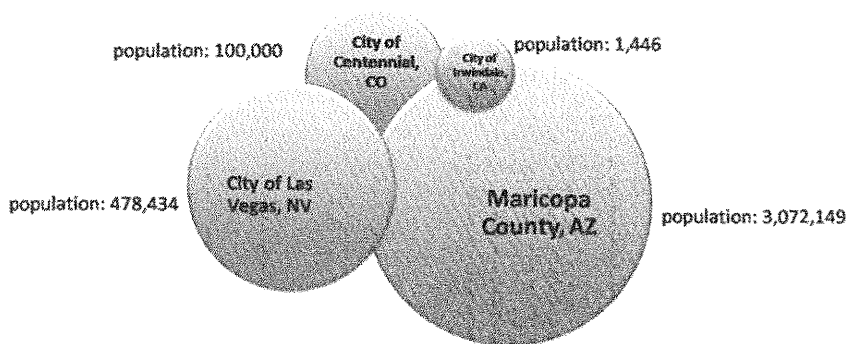
Automate Document Retention: SIRE will be configured to reflect the existing retention schedules of the departments within the City of Wasilla for different document types. With these schedules in place, improper purging will be successfully eliminated, and the retrieval of archived files will be instantaneous and accurate.

Integrate with Existing Systems: Being an open MS Windows solution using industry-standard networks and SQL or Oracle databases, SIRE is fully compatible with all open system standards and integrates with the existing computing infrastructure of the City of Wasilla. Integration to existing legacy systems can be accomplished with our SIRE API Toolkit. For document routing and workflows, SIRE utilizes any Microsoft compliant mail system. We are able to integrate the information from the City's SIMPLE Records Manager into our system.

Exceptional Records Management Functionality: The SIRE system has extensive records management and retention functions, providing City users with tools to establish new retention classifications, destruction notifications, box management and tracking via bar coding. The SIRE system even works with the City's existing bar codes and scanning hardware.

Automate Workflow Processes: SIRE's workflow feature is used to streamline and eliminate manual processes of moving paper throughout the office or even over multiple divisions and departments. Documents can be routed based on pre-defined workflows for certain document types, or they can be routed on a custom basis. SIRE has the ability to notify an authorized user of workflow events that are taking place via email or electronic queue. Reporting options enable process tracking and show graphically where projects are at in the workflow.

Scalable: From small cities to large counties, from single department to enterprise application – SIRE is built to meet your needs.

population: 100,000   City of Centennial, CO   City of Irwindale, CA   population: 1,446

population: 478,434   City of Las Vegas, NV   Maricopa County, AZ   population: 3,072,149

Next, when the City is ready, it is easy to implement our Agenda system, which simply resides on our Electronic Information Management System. Some of the many features of the system include:

- *Agenda Preparation:* Pre-Meeting activities such as agenda creation and item approval processes; Meeting activities including taking minutes of the meeting; and Post-Meeting activities such as posting agendas with attachments, summaries and minutes. SIRE even provides the posting of video to the web, a digital Voting System and request to speak functions that take place during the public meeting process.

- *Votes:* Voting can be captured during the meeting using our Minutes Plus application. The clerk keeping the minutes can record the votes as they take place. We also provide an electronic voting system that allows council members to vote electronically via computers or touch screens at the Dias. The voting system also allows the viewing of the agenda and supporting materials. It also provides the ability for council members along with other users to be able to "register" to speak on items in advance. This gives the presiding authority the ability to see in advance who desires to speak on what items.

- *Distribution:* SIRE Agenda Plus publishes all agendas to the City's website in an HTML format with links to all supporting documentation and to the video and/or audio of the meeting. Meeting Minutes and agenda packets are also indexed and stored for later search and retrieval.

- **Security:** Permission control dictates who has access to what documents, thereby ensuring confidentiality of files and activity restrictions where necessary. Permissions can be set for any actions within the system, including log in, view, edit, email, export, delete, add, check in, check out, save, and print.

- **Meeting Minutes:** Work in one single screen to take roll calls, minutes, motions, and votes associated directly with the corresponding agenda item. Even view a live stream of your recording during the meeting to see what is being broadcasted.

- **Search Capabilities:** SIRE provides excellent searching capabilities with a variety of ways to search the metadata using standard naming conventions and full text searching.

The SIRE Meeting Management components give you unsurpassed features, flexibility, and security while eliminating the hassle of dealing with multiple vendors and products to address all your meeting management needs. Here is a quick preview of some of our Agenda products:

- SIRE Agenda Plus™: Manage the entire agenda process from submitting items and creating meetings, to minutes and publishing.
- SIRE Minutes Plus™: Work in one single screen to take roll calls, minutes, motions, and votes associated directly with the corresponding agenda item. Even view a live stream of your recording during the meeting to see what is being broadcasted.
- SIRE Video Plus™: Recordings are time-stamped, indexed, and available immediately to the public. Even record an entirely independent meeting within a meeting.
- SIRE Voting Plus™: SIRE Voting Plus is a software based solution that allows users to do much more than just log votes. Being part of the comprehensive SIRE Agenda Management Suite, it can automatically access the agenda and motions created in SIRE Agenda Plus.
- SIRE Committee Manager™: Track appointments, election periods, and availability for re-election of different entities within your organization.
- **SIRE Workflow and Forms**™: Easily automate business processes that were at one time very difficult. A flow can be initiated by submitting a SIRE Form or by adding or updating an agenda item in SIRE Agenda Plus.
- **SIRE AgendaToGo**™: Simply bring your mobile device to the meeting and comment on agenda items, make annotations, notes and highlights.

Our system allows the City to format documents in the manner desired, allowing you to retain the look and feel that you have come accustomed to or, if desired, you can update your current documents and make changes as needed. The system provides intelligent routing of your documents to those that need to review and approve items submitted by staff for council and other meetings. This routing capability allows users to perform their appropriate tasks as they receive each item. Some of these functions include notating, reviewing, approving, signing and revising items and associated documentation. Standardized documents can be created and used throughout the legislative process.

Completed documents, such as agendas, minutes, etc. are easily retrieved for electronic review or printed to hard copy. When the City is ready, these documents can be selectively posted to your internet site with the click of a button. That means if certain information is considered sensitive or confidential, it can be tagged by the appropriate person and restricted for public display. Our applications have been integrated with Microsoft Office but we provide the ability for the City to use and attach any file type to an item and at any point in the legislative process.

When it comes time to retrieve and view the data in our system we have provided easy to use retrieval methods and search capabilities for the end user including keyword and full text capabilities. We provide elaborate security to control access to the data maintained in this system so that the City can control access as your needs dictate.

SIRE manages your meeting needs over its three main components: pre-meeting activities, such as agenda creation; in-meeting activities, including taking minutes; and post-meeting activities, such as Web posting of minutes and video.

We at SIRE Technologies are grateful for the opportunity to provide this response to the City of Wasilla and appreciate your consideration of one of the most innovative and functional Electronic Information Management System on the market.

We are looking forward to having the honor of working with you on this project!

Sincerely,

Rick Haviland
Regional Sales Manager
rhaviland@siretechnologies.com
801.634.1896

Required Features for Objective No. 1

1. **The EIMS must capture, index, store and retrieve paper based/imaged and electronic documents into one system.**

Our products include document management and agenda automation solutions. These products are part of the software suite called SIRE, which stands for: Store, Index, Retrieve, and Exchange—and serves as the inspiration for our company name.

2. **The information in the EIMS must be readily accessible, centrally located and secure to the latest American National Standards Institute (ANSI), International Organization for Standardization (ISO) and Association of Records Managers and Administrators (ARMA) industry recognized security standards.**

With SIRE, different files can be assigned different levels of security in order to protect files with varying security needs and guarantee compliance with various rules and regulations, such as HIPAA, Sarbanes-Oxley, and the Patriot Act. SIRE is also compliant with DoD 5015.2 ANSI, ISO ARMA and ADA.

3. **The EIMS must have integration service to process documents directly to the EIMS as well as Microsoft Office applications and other similar applications.**

SIRE is a Certified Microsoft Gold Partner and is built upon .NET technology. As such, it is fully integrated with all Microsoft applications and systems. SIRE provides a Microsoft Office Add-In that allows you to save MS Office documents directly into the SIRE product suite. You are presented with a small window to index the document and select what category of documents it relates to. All data related features are permissions based, so you can control who can perform these integrations.

Integrations are a strong point of the SIRE product, and we seamlessly integrate with the City's existing technical environment as outlined in this RFP. Because of SIRE's open architecture and API toolkit, it is possible for SIRE to integrate with virtually any other software application. This can be done via thick client integration, thin client integration, API integration, data exchange, and more. Each integration is discussed individually and an appropriate integration solution is selected. The solution can vary based on whether the other application is client based, web based, etc.

4. **The EIMS must support concurrent users and be scalable to add users as needed.**

SIRE offers a modular solution that allows the City to pick and choose which systems best meet their needs. We also support concurrent users and allow the City to add users as needed.

5. **The EIMS system should support the following features:**
    a. **Basic document searching functions such as document index values and full text search capability.**

SIRE provides excellent searching capabilities with a variety of ways to search the metadata using standard naming conventions and full text searching. Folders and files stored in the SIRE system can be easily retrieved using any of six search methods available in WebCenter, described below.

Quick Search
> WebCenter lets you designate a single Saved Search as your Quick Search, which you can run easily by clicking the Quick Search link.

Simple Search
> A Simple Search compares input search criteria to folder index fields, or the text content of files.

> During a Standard Simple Search, folders with index fields that match the search criteria are returned as search results. A Full-text simple search compares search criteria to the text content of files within designated folders, and returns files that contain text that matches the search criteria.

Advanced Search

> An Advanced Search compares input search criteria against single or multiple index fields, and allows more variety of search conditions than a simple search. You can search for index fields "Equal To" (=) or "Greater Than" (>) input criteria, and require search results to meet multiple criteria using "And" and "Or" operators. Full- Text Advanced Searches compare search criteria to the text content of your files.

Cross Cabinet Search

> A Cross-Cabinet Search performs a Simple Search across multiple file cabinets.

Saved Search

> WebCenter lets you save and perform commonly-used searches easily without having to input search settings and search criteria again. Saved searches are associated with individual users, and cannot be shared with other users.

Custom Search

> Custom Searches are similar to saved searches, but are created by a SIRE Administrator using XML files, and made available to multiple users of SIRE WebCenter. Each of these searches can be performed in either of two modes: Standard and Full-Text. Standard searches compare input search criteria to the index values that describe the contents of folders and files in the SIRE system.
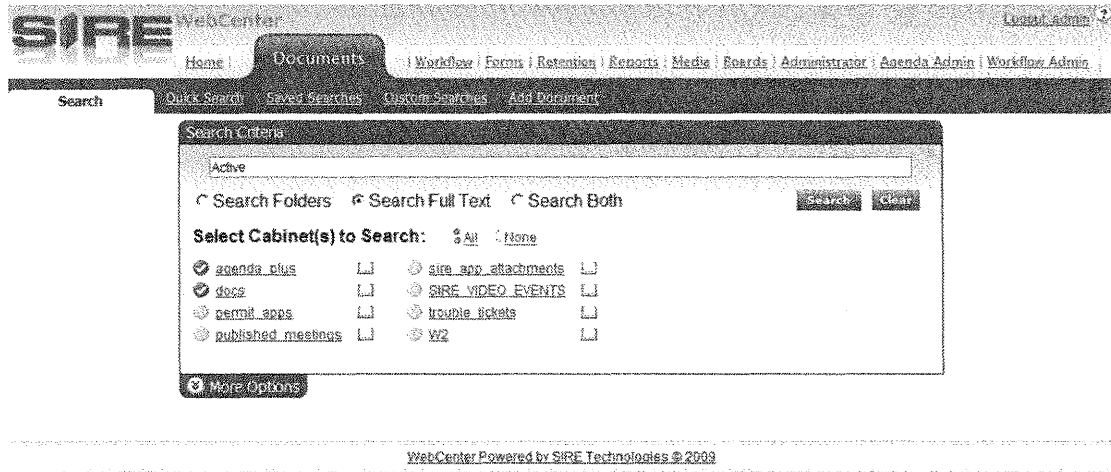
Full-Text searches identify files that contain text that matches input search criteria. Full text searching works with many file types including but not limited to Word, Excel, PDF, WordPerfect, HTML and XML documents. SIRE advanced search capabilities include but are not limited to the following:

> Multi-field index searches
> Conditionals searches using AND, OR, LIKE, NOT, etc.
> Exact match and wildcard searches
> Boolean
> Full text search
> Fuzzy, Boolean, stemming, and phonetic searches.
> SIRE's full text search highlights the hits on the page
> SIRE provides easy to use search and print capabilities.

> SIRE allows for different file cabinets created each with its own user-defined indexes available for searching.
> The system can assign a unique identifier to the document and searching can be done in a variety of ways.
> Search can be done with conditions such as greater than, less than, wild card, range searches, simple values etc.
> Users can search by date added, author, and recipient
> FTR searching is available in SIRE.
> Users can generate reports and queries as needed by exporting search and query results and hit lists.
> You can now save frequently performed searches to reduce typing and increase user efficiency.

b. Audit features representing the status of documents that are in check-in, check-out and version control management.

SIRE's solution addresses security at the folder, document, word and annotation levels for both internal and Internet access. Permissions can be set for any actions within the system, including log in, view, edit, email, export, delete, add, check in, check out, save, and print. Permissions can be granted at the cabinet, folder, and annotation levels or you can protect confidential words or paragraphs in individual documents using redaction capabilities. In addition, administrators can control what actions a user can perform on documents within a cabinet. Permissions can be assigned at the group level, or custom permissions can be applied to individual users.

The following is a partial list of permissions which can be managed at the user and group levels within the SIRE solution. Auditing can be enabled on any or all of these functions:

> View document
> Add
> Print
> Delete
> Edit
> E-Mail
> Save
> Export to CD
> Check Out/In
> Launch file in native application

c. Annotation services available to support communication and collaboration.

SIRE's annotation capabilities include: redaction, markup, text, highlighting, sticky notes, audio notes, shapes, encrypted redaction, lines, arrows, hotspots, stamps, push pin notes, ruler, protractor, and signatures. The solution also provides a notes panel for each image where notes relating to that specific image maybe created and kept.

Annotations/redactions are stored in a database table and do not alter your files. They can be grouped in "Layers" and have extensive search and permission capabilities. Users may search on actual text in an annotation or an annotation type.

d. The EIMS must support "related document(s)" capability to minimize search requirements.

The SIRE system fully supports related document capability as well as performs other advanced search methods for greater efficiency.

e. The EIMS must integrate with the City of Wasilla's email system to support communication, collaboration and basic workflow (Exchange/Outlook 2003 & 2010).

SIRE is fully compatible with Microsoft Exchange/Outlook 2003 and 2010. Direct integrations to email clients are conducted using MAPI and allow SIRE to retrieve emails and email attachments directly into SIRE for indexing and storage. We also use MAPI to enable our users to send emails directly from the SIRE interface while automatically attaching any selected files that are stored within the product. Emails can then be automatically indexed with values such as date, from, to, and subject line for fast and easy retrieval. Email attachments are saved in their native format, while the email body is saved as a text file.

f. **The EIMS should support as many different computer applications, forms and document types as possible.**

The SIRE Viewer™ feature supports over 300 different file types in their native formats without the need for the native application, including black and white or color photos. SIRE also allows the creation of compound documents: a single document comprised of multiple different file formats, all of which can be viewed in the SIRE Viewer provided they are the supported file types. Non-supported file types can be automatically launched in the native application if it is present on the viewing workstation. Supported file types can be viewed in a client environment or from a browser, without native applications including supported AutoCad files.

SIRE Viewer and the viewer capabilities in Capture.NET provide the following robust functionality:

> Users can scroll and page up and down within a document.
> Users can browse forward or backward through documents when making edits or just viewing.
> Users can resize windows.
> The retrieval screen can display both the index and the imaged document simultaneously side-by-side.
> Users in SIRE Capture.NET can index documents while looking at the documents on the screen.
> Users can browse through documents and quickly retrieve selected pages.
> Users can print groups of pages from a long document by simply identifying the range of page numbers.
> Users can simultaneously display two pages of the same document side by side.
> Users can simultaneously display two or more pages of different documents side by side.
> Users can view hit lists, thumbnails and first pages of documents while selecting documents to view.
> Zip files can be decompressed directly in the Viewer
> Submission of a reason for viewing a file can now be required and logged

The SIRE system has a robust user interface supporting all the latest viewing options, including but not limited to the following:

> Zoom In, Zoom Out, and Zoom Select
> Image Pan
> Image Crop
> Image Cleaning
> Files can be viewed at various magnifications, including 50%, 75% ,150% etc.
> Move First, Move Previous, Move Next, and Move Last
> Goto Page, Page Previous, and Page Last (for files with multiple pages)
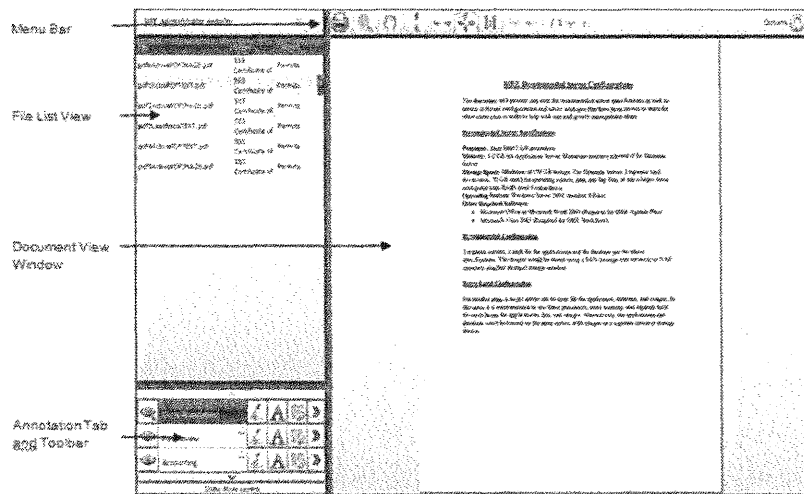
> ➢ Rotate 90° Right, Rotate 90° Left, Rotate 180°
> ➢ Fit Height, Fit Width, Fit Page
> ➢ Show Layers and Show Colors
> ➢ Thumbnail viewing
> ➢ Select and view specific pages (Go to page)

g. The EIMS must support differing physical document properties.

SIRE's EIMS solution supports many differing physical document properties. For example, SIRE Warehouse Sync builds on the innate functionality of the SIRE Solution Suite to label, track, and manage the contents of boxes archived in a warehouse. Boxes can be quickly searched for and retrieved using the descriptive indexes that label each box record in the SIRE system. Records for new boxes can be created using electronic SIRE forms, accessible to users granted explicit permission to create new boxes. Additionally, approved users can easily request delivery of boxes from the warehouse to a location of their designation using electronic SIRE forms.

The activities of warehouse personnel are greatly simplified by SIRE Warehouse Sync.
Requests for pickup of newly created boxes, and delivery and pickup of previously archived boxes are routed to the Workflow queue of warehouse personnel. SIRE Warehouse Sync is fully integrated for use with barcode scanning devices at every archival stage, making it easy to label and track boxes wherever they are located.

Additionally, a complete inventory of warehouse contents, including the specific shelved location of individual boxes, can be created as quickly as the push of a single button.

h. The EIMS must support definable retention periods and should have a definable notification feature for retention.

The SIRE Record Retention Module included with SIRE WebCenter makes management of record retention easy. Maintenance, storage, retention, archiving, and disposal of organizational documents can be driven by any of several forces, including internal business needs, compliance with legislative statutes, audit accountability, and many others.

SIRE retention schedules are composed of terms, through which documents assigned to that retention schedule pass. Documents can pass through these terms in chronological succession, or move back and forth between terms as defined by the retention schedule. When a document reaches the end of a term, a task item is sent to the SIRE user assigned to manage the retention of that document. The user then designates the next step in the document's retention, such as inactivation, archival, disposal, etc.

Authorized Users or Administration Users can put items on "Legal Hold", meaning that there are several factors that could be implemented to put documents on hold until legally acceptable to release to retention schedule application.

All the guess work is gone, and your records retention will be worry free. You can also:

> ➢ Manage retention for both electronic and paper documents
> ➢ Tackle legal requirements for retention according to your specific organization
> ➢ Use saved searches to quickly set up retention criteria
> ➢ Work with retention schedules from the same interface you use for other document management tasks
> ➢ Import Local and State Retention Requirement Schedules.
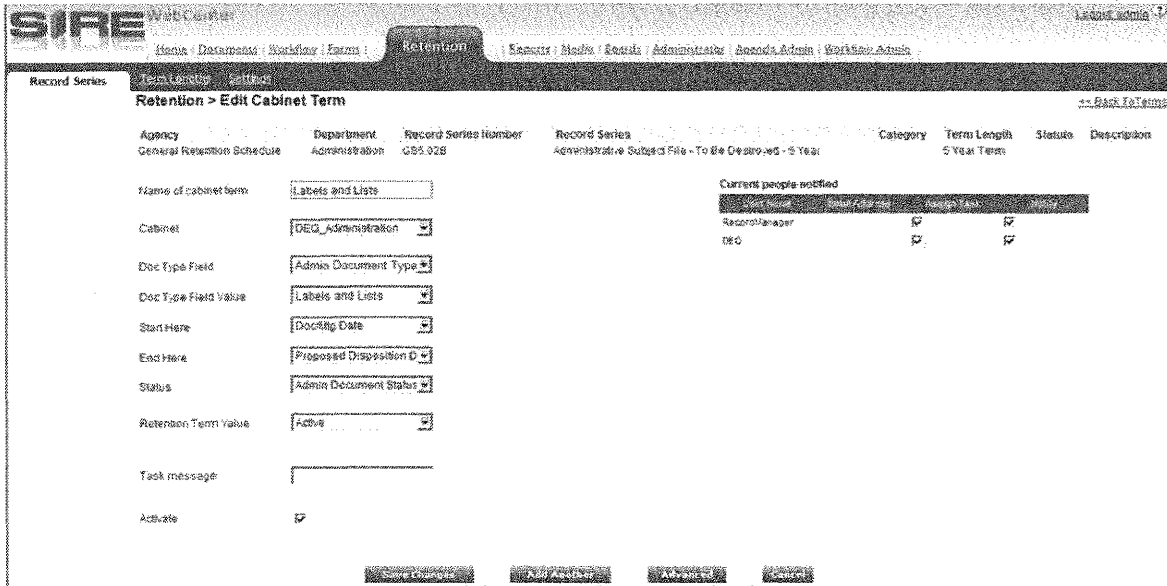
6. The EIMS must be able to grow into a workflow process to promote collaboration within and throughout City departments.

SIRE Workflow will allow the agency to easily automate business processes that were at one time very difficult. A flow can be initiated by adding or updating a document in SIRE FileCenter.NET or WebCenter, submitting a SIRE Form, or by adding or updating an agenda item in SIRE Agenda Plus. Most organizations use workflow to streamline manual processes. Typically, manual processes move paper from one work-point to another. But, workflow can incorporate multiple work-points at a time allowing several tasks to be completed simultaneously.
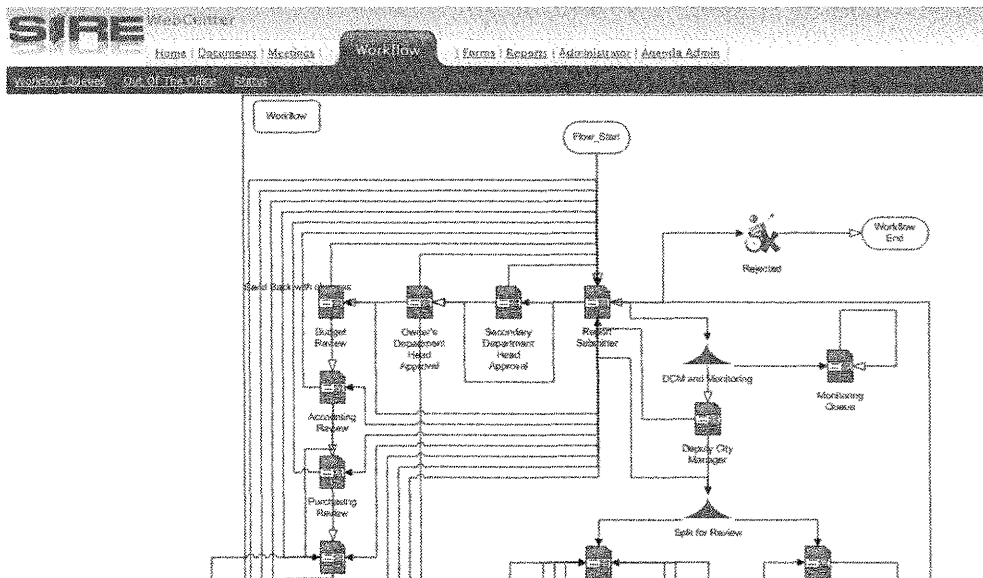
Utilizing the Microsoft Visio© engine, SIRE Workflow provides a robust and user-friendly graphical interface for easier creation and editing of workflows. The versatile design tool kit provides shapes that make sense to the casual user, yet each one has built-in, configurable properties including decision-making, approval/rejection of items, notification, and routing that allow you to not only create a workflow diagram, but also create the electronic process that manages your workflow process and allows you to get the work done on time.

Basic Workflow Functions:
SIRE's basic workflow capabilities include:

- Automatic initiation of workflows through:
  - Adding or editing a document
  - The agenda approval process
  - Submission of an electronic form
- Intelligent routing
- Workload management
- Easy document routing for review and approval
- Automatic notification via e-mail or workflow queue
- Parallel work processing
- Automatic alerts to specific users of specific events within the system
- User-friendly system administration

Advanced Workflow Functions:

SIRE's advanced workflow functionality allows the flexibility to accommodate virtually any business rule and allow you to automate any process. SIRE's Workflow advanced functionality allows you to perform all of the following tasks:

- Create unlimited workflows each with customized rules
- Assign tasks to individual or multiple specific users
- Assign tasks to individual users or to users in a role, including dynamic role assignment
- Create intelligent, custom response forms at any step of a flow to facilitate the workflow process
- Create and add a new document to the document management system from data gathered during workflow
- Task delegation, allowing administrators/supervisors to delegate a previously assigned task to another user
- Vacation/time-off scheduling allowing you to designate when users are off or on vacation, so tasks are routed to other users assigned to a role
- Management reporting, and real-time monitoring of flows using a graphical workflow viewer showing the exact location of a bottle neck or task on your workflow diagram
- Set deadlines on tasks and easily re-route delayed processes to another user at any time after receiving auto notification of a bottle neck
- Initiate another workflow during any step of a current workflow instance

Using SIRE Workflow's advanced capabilities; VBScript can be inserted into any step of a process to provide data validation, custom task routing or interaction/integration with a client's existing applications.

SIRE Routing

Additionally, SIRE provides a built in Routing option that is easily configurable for self-managed approval processes. Users simply select from a drop down the next reviewer required in the process. A history of who has reviewed, revised and commented on the routing of a staff report is maintained. This takes minimal effort to setup and is available out of the box.

SIRE Forms

SIRE Forms lets you quickly design and publish electronic forms that users can complete and submit online. SIRE then processes the forms and either uses them to kick off a business process in SIRE Workflow or stores them for later retrieval. SIRE Forms allows you to create electronic forms either from

scratch, or based on an existing electronic or paper form your organization currently uses. Data fields are created and associated with form fields. When the form is filled out online, the data fields provide information useful for other tasks such as in SIRE Workflow, populating index fields, or creating a document in a SIRE Cabinet.

If your form is based on an existing paper form, you can scan it and use it as a "background" for your SIRE form. You can then create data fields and place them at specific locations on top of the background image. The layers of the completed form appear identical to the original, but can now easily gather data electronically. You can also take existing electronic forms created in Microsoft Word or Excel, and import them as SIRE forms, utilizing the existing data entry fields as SIRE data fields to store information in within your SIRE system.

Forms gives you a set of useful tools including a WYSIWYG (What You See Is What You Get) design screen and click-and-drag field and caption creation, so you can see exactly what your form looks like as you design it.

The Forms module available in SIRE WebCenter creates folders within the SIRE filing system, and replaces paper forms previously required to gather information for business purposes with electronic forms created by your SIRE Administrator. These forms can be offered within an organization or to the public to be completed and submitted over the internet or intranet. Because all data submitted to these forms is already in digital format, they can be quickly and accurately processed by the SIRE filing system and used to execute workflow processes, or stored within the SIRE cabinet structure for later retrieval and use.

Required Features for Objective No. 2

Agenda Item Creation and Management:

- **Support the creation and viewing of draft and final agendas with an easy user interface.**

All modules in the SIRE suite of products have been created with ease of use in mind. Many of our clients don't require IT personnel to be involved and are having their system administered by department users instead. We have created easy-to-use GUI interfaces that allow users to create Forms, Workflows, Agendas, and add new users.

- **The interface needs to display the item status and allow for easy editing such as adding documents to an item, adding item details, or adding item notes.**

SIRE fully complies with this requirement.

- **Create links to, or associate, supporting material for meetings with Agenda Item document.**

SIRE fully complies with this requirement.

- **Allow flexible reformatting of documents, such as font, indentation, numbering, order of items, etc.**

SIRE allows the user to customize their document formatting specifications, or the system will automatically renumber based on insertion. Users can easily override the SIRE numbering system and reorder it at any time.

- **Ability to print entire Agenda and all attachments with configurable numbering including sequential numbering.**

SIRE fully complies with this requirement.

- **Allow supporting materials to be attached to an Agenda item during the scanning process (Directly Scanned to Item).**

SIRE fully complies with this requirement.

- **Support the concatenation of associated documents for display, website and print.**

SIRE fully complies with this requirement.

- **Provide Shells/Templates for meeting types.**

SIRE sets up the initial shells/templates during our implementation process. Once we train City users on our products, they are able to configure shells/templates on their own. This feature allows the City to maintain the same look and feel, which is addressed during the discovery process.

- **The agenda automation package shall have the ability to accept different types of attachments to support and link to agenda items. These file types include text, graphics, word processing applications, spreadsheets, acrobat, HTML, drawings, and photos and other images. Digital media such as visual files shall also be supported. (TIFF, JPEG, MPEG, GIF, PDF, BMP, PNG, Pict, AVI).**

The SIRE Viewer™ feature supports over 300 different file types in their native formats without the need for the native application, including black and white or color photos. SIRE also allows the creation of compound documents: a single document comprised of multiple different file formats, all of which can be

viewed in the SIRE Viewer provided they are the supported file types. Non-supported file types can be automatically launched in the native application if it is present on the viewing workstation. Supported file types can be viewed in a client environment or from a browser, without native applications including supported AutoCad files.

- **Ability to support annotations to attachments.**

SIRE's annotation capabilities to attachments include: redaction, markup, text, highlighting, sticky notes, audio notes, shapes, encrypted redaction, lines, arrows, hotspots, stamps, push pin notes, ruler, protractor, and signatures. The solution also provides a notes panel for each image where notes relating to that specific image maybe created and kept. Annotations/redactions are stored in a database table and do not alter your files. They can be grouped in "Layers" and have extensive search and permission capabilities.

- **Allow revision control of attachments.**

SIRE fully complies with this requirement.

- **Include a checklist of standard items, including roll call, public presentation and orders of the day. As needed, the checklist of standard items can be edited and amended by authorized users.**

These features are part of SIRE's Minutes Plus and Roll Call features.

Minutes Plus provides the ability to create minutes, track attendance, motions and votes and also to make any notes necessary during the meeting.
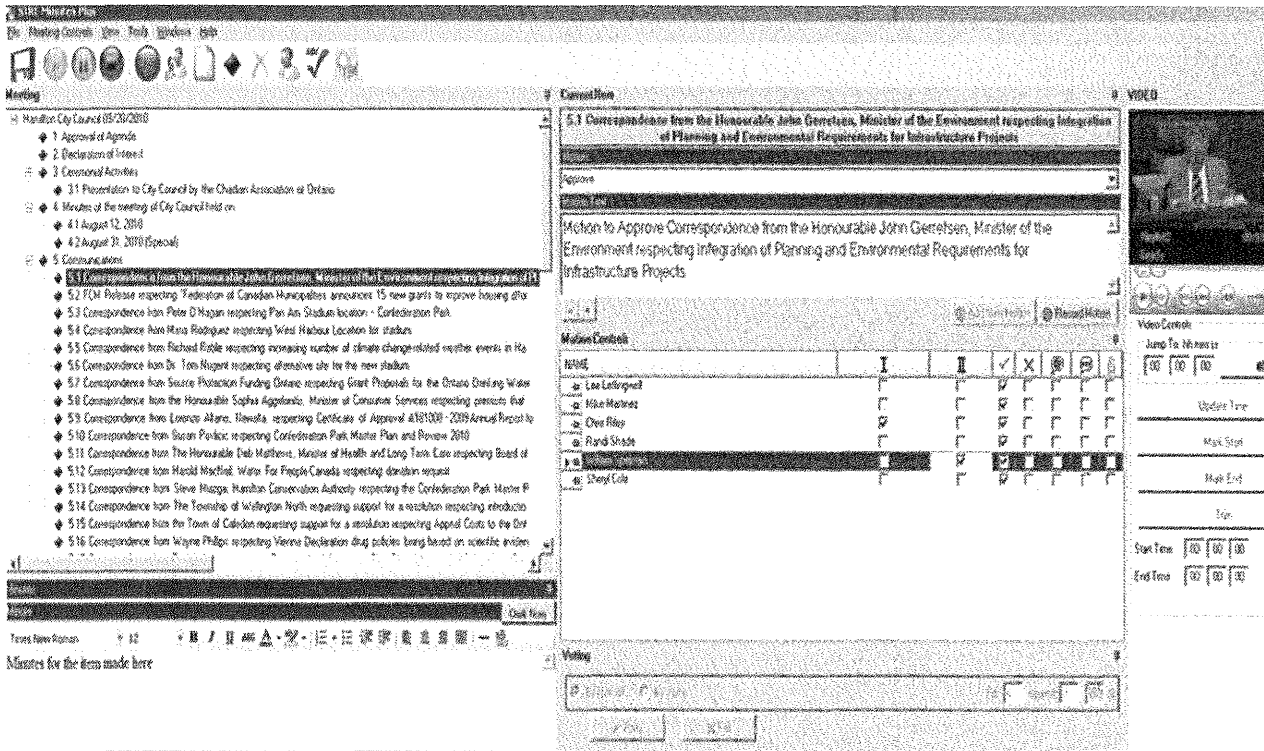
Record roll call, speaker notes, motions, and votes. Users have the flexibility of recording a variety of motions and updating roll call on the fly through a single, simple interface. And when it's time to start an executive or committee meeting in the middle of things, SIRE's "meeting within a meeting" functionality makes it easy to keep up with events without losing pace. Minutes are quickly published to the public website with a push of a button. Each agenda item is automatically linked to its supporting materials (if any) and linked to the video recording – allowing you to do more in less time.

Great for meetings of all sizes, SIRE's infrastructure allows for quicker rollup and transfer of large agendas. Internal users are able to find and view past meeting minutes and supporting materials, including audit trails, with an easy- to -use search engine. Constituents are able to find meeting minutes by topic through key word search on a public interface thereby creating a self-service portal for public requests. Minutes Plus makes it easy on IT and AV staffs with its low maintenance design.

Being part of a single system, Minutes Plus does not require any special coding, scripting or integration to interact with SIRE's agenda and video components. On those rare occasions when technical support is needed, SIRE offers industry-leading technical support from its US-based support center. Rest assured that on meeting day SIRE provides an after-hour contact number for all its clients. Plus, SIRE also eliminates the hassle of calling multiple vendors for support on the different components of your agenda solution.

- **Ability to perform, but not be limited to the following document import methodologies: fax and direct scanning; direct loading and copying; direct electronic import of documents from MS Office and other applications.**

SIRE fully complies with these requirements.

- **The system shall be able to work with any size of document.**

SIRE does not modify the files uploaded into the repository and can handle any size document.

- **An agenda can be rolled up as draft agenda while items are not approved.**

SIRE fully complies with this requirement.

- **Must maintain and make available the history of all agenda items that have been copied to other agendas.**

External as well as internal users can perform a search via keyword or phrase and locate information they are interested in and see the entire history for that item. That search will search all Agenda headings as well as all supporting documents in the system to find related information. Once the information is found a user can see every meeting an item was ever in and all information about each meeting. The user will be able to see how each member of every board or commission voted in each meeting the item was heard.

They can also see or listen to any video or audio discussion regarding that item as well as subscribe to an RSS feed regarding the item so if it is heard in additional meetings they will get notification.
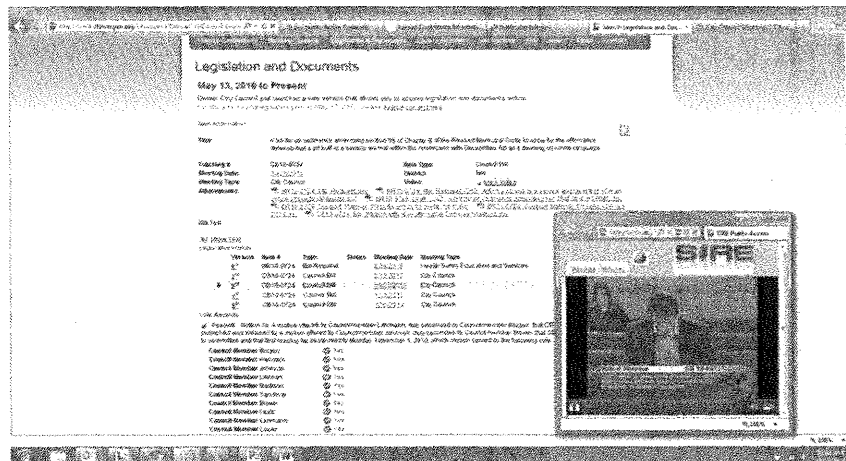
- **Have the ability to scan attachments into an agenda.**

SIRE fully complies with this requirement.

- **The agenda automation package shall have a numbering system that designates between ordinances and resolutions and associates an ordinance request numbering system with a tracking number.**

The SIRE solution allows users to track the item in Agenda Plus and designate ordinances, resolutions, etc. Users can also include a tracking number. To find this metadata, users can screenshot the title entry screen to make it visible below the item title box.

- **Ability to make revisions to agenda packets including the ability to add attachments that are received at a meeting, without regenerating the agenda.**

SIRE allows users to make revisions to agenda packets without regenerating the agenda, unless it has already been published.

- **The system shall allow user defined numbering of agenda items.**

The SIRE system allows users to customize the numbering scheme or choose to accept or override SIRE's automatic numbering system.

- **Must be able to upload newly created items and Agendas immediately.**

SIRE fully complies with this requirement.

- **Allows for editing, revising or replacing scanned documents.**

SIRE fully complies with this requirement.

- **Upon login, the system should provide users with a summary view of active items relevant to them.**

SIRE users can choose to immediately view their workflow upon login, which indicates what tasks are assigned to them and where they are in the workflow queue.

Scheduling of Agenda:
- **Allow pending items to be placed on the agenda.**

SIRE Workflow allows users to place pending items on the agenda.

- **Ability to approve agenda items individually or as a group within a meeting.**

SIRE fully supports this requirement.

- **Support creation of Long Range agenda items.**

SIRE fully complies with this requirement.

- **The agenda automation package shall allow agenda items to be moved with all associated attachments from one agenda to another, without disrupting any workflow processes associated with the item.**

SIRE allows users to move items from one agenda to another without stopping the workflow.

- **The agenda automation package shall allow an unlimited number of meetings to be added and managed by the system.**

SIRE fully complies with this requirement.
- **Provide the capability to schedule as far into the future as desired.**

SIRE fully complies with this requirement.

Workflow Management:
Capable of showing where each agenda item is within the workflow process and its status (approved, rejected, being drafted, final draft, etc.).

SIRE offers real-time monitoring of flows using a graphical workflow viewer showing the exact location of a bottle neck or task on your workflow diagram, including each task's status.

- **Provide capability to allow versioning of agenda's and agenda items; allow process steps such as draft, revision, and final agenda.**

SIRE allows users versioning abilities for agendas and agenda items.

- **Ability to select individual pages or sections of a document to be viewed, routed, included in packet, or printed.**

SIRE fully complies with this requirement.

- **Provide tracking of documents through workflow process.**

SIRE allows users to track documents and tasks through the workflow process.

- **Provide multi-level (multiple criteria, multiple approvers) workflow.**

SIRE's Workflow advanced functionality is completely customizable, and allows administrators to assign tasks to individual or multiple specific users, assign tasks to individual users or to users in a role, including dynamic role assignment, and delegate a previously assigned task to another user.

- **Allow insertion of items to any step of the workflow.**

SIRE fully complies with this requirement.

- **Allow the withdrawal of an item from the workflow.**

SIRE fully complies with this requirement.

- **Provide appropriate notification of workflow events.**

SIRE provides automatic notification via e-mail or workflow queue.

- **Allow deadlines to be set based on meeting time, date, response time.**

SIRE allows users to set deadlines on tasks, including based on meeting times, dates and response times, and easily re-route delayed processes to another user at any time after receiving auto notification of a bottle neck.

- **Allow for escalation and notifications based on deadlines.**

SIRE fully complies with this requirement.

- **Provide authorized users with the ability to easily create standard and ad hoc workflows for the approval process.**

Once the user has been trained by SIRE staff, they can set up their own workflows.

- **Must allow authorized users to be added or deleted at any point in the process.**

SIRE fully complies with this requirement.

- **The workflow shall not limit in any way the type of electronic files that can be attached to the flow.**

SIRE fully complies with this requirement.

- **Display all workflow queues that a specific user is responsible for at one time, and allow the user to decide which queue they would like to access.**

SIRE allows users to see their workflow queues and assigned tasks once they login.

- **Ability to assign coverage if a user will be out of the office for a specified period of time.**

Vacation/time-off scheduling allowing you to designate when users are off or on vacation, so tasks are routed to other users assigned to a role

- **The workflow shall allow parallel processing of items as well as sequential processing of items.**

SIRE fully complies with this requirement.

- **The workflow shall allow delegation of items to other users of the system.**

SIRE's Workflow advanced functionality allows users with the correct permissions to create unlimited workflows each with customized rules; assign tasks to individual or multiple specific users; assign tasks to individual users or to users in a role, including dynamic role assignment; delegate a previously assigned task to another user; set deadlines on tasks and easily re-route delayed processes to another user at any time after receiving auto notification of a bottle neck.

- **Provide for the ability for items approved by one body to automatically flow to the next required approval body.**

SIRE's basic workflow capabilities include intelligent routing and automatic flow for review and approval.

Agenda Final Assembly and Distribution:
- **The agenda automation package shall have the ability to automatically publish a finalized PDF agenda with all associated attachments.**
- **Provide the ability to automatically assemble agendas using pre-defined templates.**
- **Provide the ability over-ride automatically assembled agendas.**

SIRE fully complies with these requirements.

Agenda Access:
- **Provide a method to download the agenda and all associated attachments as a single PDF.**

SIRE fully complies with this requirement.

- **Provide the ability to download materials for individual agenda items, without the need to download the entire agenda.**

SIRE fully complies with this requirement.

- **The solution should provide bookmarks in the PDF agenda packet to allow users to jump to relevant items in the packet.**

Bookmarks are placeholders that make it convenient for users to recall a previously saved zoom view or page in a document or drawing. SIRE fully supports bookmarks for PDF agenda packets.

Vendor Requirements

Vendor Qualifications:
- **Vendor must have experience and references in the government market, for entities of similar scope and size to the City of Wasilla.**

With more than 380 successful implementations and 90,000 users in the government sector, our solution has been proven to dramatically increase staff productivity, effectiveness, and overall efficiency by providing instantaneous access to virtually any file stored in our system from anywhere and literally eliminating the problem of lost, misplaced, or duplicate files. SIRE also significantly elevates the security of files by managing access on the cabinet, folder, and file level, thereby regulating public access to classified information. Access can be restricted to viewing and printing rights only for selected individuals, groups, or document types.

Keeping with its reputation as the innovative leader, SIRE was the first to migrate over to the revolutionary .NET architecture. This new platform technology is proving to provide superior ease-of-use, flexibility, less maintenance, and even better security. As you might expect from a state-of-the-art system, SIRE is compliant with both DoD 5015.2 and Sarbanes Oxley.

SIRE has also been a pioneer in the agenda management industry with one of the longest histories and some of the largest clients. SIRE was the first to incorporate streaming video, minute's automation and voting records with the agenda management tool. SIRE remains one of the few offering key functions such as a powerful workflow tool capable of accommodating multiple committee review processes and the only vendor offering a true enterprise agenda management tool.

SIRE Document Management Clients

Through our nearly twenty years of doing business with government agencies, we have developed a mature product with a support infrastructure that maintains itself through annual maintenance fees. Because of this, our customers enjoy the longest list of standard features in the industry, simple integration with third-party applications and unparalleled customer service.

Here is a list of some of our Document Management clients:

Anchorage, Municipality of AK
Ashland, City of OH
Baldwin, County of AL
Bluffdale, City of UT
Brazoria, County of TX
Breckenridge, Town of CO
Browning Arms
Cache, County of
Cal Train
Calabasas, City of
Calgary, City of
Cape Coral, City of
Carbon, County of UT
Casa Grande, City of
Centennial, City of
Citrus Heights, City of
Clark, County of NV
Clark, County of WA

Compton, City of
Cortland, Town of
Council Bluffs, City of
Criminal Justice Coordinating Council (CJCC), State of Georgia
Crow Wing, County of
Culver, City of
Dallas Independent School District
Daly, City of
Dana Point, City of
Davis, County of
DeForest, Village of
Denver, City/County of
Desert Hot Springs, City of
Dunwoody, City of GA
Durango, City of
Eden Prairie, City of
Edmonton, City of – CANADA

Effingham, City of
Elsinore Valley Municipal Water District
Emeryville, City of
Florida Office of Attorney General (OAG)
Folsom Cordova Unified School District
Fort Collins, City of CO
Foster, City of
FourSquare Properties
Frisco, City of
Garrett College
Georgetown Municipal Water
Georgia Student Finance Commission
Glendora, City of
Glenn County Assessors
Halton, Regional Municipality of

Hennepin, County of
Hillsborough, Town of
Hot Springs PD, City of
Huntington Beach, City of
Irvine PD, City of
Irvine, City of
Irwindale, City of
Johnson, County of KS
Knox County Water
Kuester Management Group
L-3 Communications Sys. West
Lake City, City of MN
Lake Forest, City of
Las Vegas, City of
Lee, County of FL
Lee's Summit, City of
Lehi, City of
Lincoln, City of
Longmont, City of CO
Lorain Public Library
Louisiana Attorney Disciplinary Board
Louisville/Jefferson, County of, Metro Government
Maricopa, County of
Maricopa, County of (Clerk of Board)
Marin District Attorney, County of
Marion, County of FL
Mascoutah, City of
Menlo Park Fire Protection District
Mercer Island, City of
Mesa, County of
Mesquite, City of NV
Metlakatla Indian Community
Middleton, City of
Midland, City of
Mission Viejo, City of
Modesto, City of
Monroe, County of MI
Monterey, City of
Montverde, Town of
Moorhead, City of
Moreno Valley, City of
Napa, City of

Naperville, City of
Nevada Supreme Court
Nevada Supreme Court Mortgage Arbitration
Neways Services, Inc.
North Las Vegas, City of
Oak Lawn, Village of
Oakville, Town of
Oklahoma, City of
Ontario, City of CA
Orillia, City of CA
Osceola, County of
Pacifica, City of
Peterborough, City of
Phoenix, City of
Pittsburg, City of CA
Placer, County of
Placer, County of HHS
Placerville, City of
Port Hueneme, City of
Portage County Water
Post Falls Idaho, City of
Powell, City of
Prescott Companies
Provo, City of
Red Deer, City of
Redwood, City of CA
Richmond, City of CA
Rocklin, City of
Roeland Park, City of
Roseville, City of CA

Sacramento Board of Ed., County of
Sacramento, County of
Salt Lake County, Assessor's Office
Salt Lake County, Auditor's Office
Salt Lake County, Contracts & Procurement
Salt Lake County, District Attorney
Salt Lake County, Recorder's Office
San Bernardino, County of
San Bruno, City of
San Carlos, City of

San Diego City Employees' Retirement Services (SDCERS)
San Diego, City of
San Jacinto, City of
San Joaquin Valley
Santa Clara, City of
Santa Cruz, City of
Sarasota, County of
Sault Ste Marie, City of
SBCERA
Shelby, County of, TN
Sioux Falls, City of SD
South Jordan, City of
South Salt Lake, City of
Springfield, City of IL
Stair, Pedersen & Williams Accountancy
State of Utah, Dept. of Risk Management
State of Utah, Parks and Recreation
Steamboat Springs, City of
Stony Plain, Town of
Stratford, City of
Summit, County of UT
Sutter Insurance
Sylvania Township, OH
Sylvania, City of
Tarrant, County of
Temecula, City of
Tempe, City of
Tooele, County of
Tucson, City of
Turner Construction Company - Oakland Roadways
Uintah, County of UT
Utah Transit Authority
Ventura, County of CA
Wake, County of
Walnut Creek, City of
Wasatch, County of
Washington DC Bar Association
Washington, County of UT
Waunakee, Village of

Our references include:

Mercer Island, WA – EDMS & Agenda & Video
Population: 22,000
Contact: Mike Kaser, IT Manager, 206-275-7772

City of Durango, CO – EDMS & Agenda & Video
Population: 14,741
Contact: Janice Bourret, Systems Analyst, 970-375-5072, bourretjs@ci.durango.co.us

City of San Carlos, CA – EDMS & Agenda & Video
Population: 27,718
Contact: Christine Boland, City Clerk, 650-802-4219, cboland@cityofsancarlos.org

Town of Stony Plain, AB – EDMS & Agenda
Population: 12,363
Contact: Carol Schofield, Manager of Administration, 780-963-8589, c.schofield@stonyplain.com

- **Proposed project team leads must have experience successfully implementing systems of a similar scope and size to the City of Wasilla.**

The Project Manager proposed for the City of Wasilla project is Brad Painter. Below is a partial list of his successfully completed projects;

> - Benicia, CA – Hosted Agenda Plus, Minutes Plus, Video Streaming Forms and Workflow, SIRE Pub
> - Brazoria County, TX – Enterprise wide Agenda Plus, Minutes Plus, Voting Plus, Audio Streaming, Forms and Workflow, Electronic Document Management, SIRE Pub, Data Conversion
> - Clark County, NV - Enterprise wide Agenda Plus, Minutes Plus, Streaming Integration, Forms and Workflow, SIRE Pub
> - Compton, CA - Enterprise wide Agenda Plus, Minutes Plus, Streaming Integration, Forms and Workflow, SIRE Pub
> - Dallas Unified School District, TX - Enterprise wide Agenda Plus, Minutes Plus, Video Streaming, Forms and Workflow, Electronic Document Management, SIRE Pub
> - Desert Hot Springs, CA - Enterprise wide Agenda Plus, Minutes Plus, Video Streaming, Forms and Workflow, Electronic Document Management, SIRE Pub
> - Frisco, TX - Enterprise wide Agenda Plus, Minutes Plus, Video Streaming, Forms and Workflow, Electronic Document Management, SIRE Pub, Conversion
> - Glendora, CA - Enterprise wide Agenda Plus, Minutes Plus, Video Streaming, Forms and Workflow, Electronic Document Management, SIRE Pub
> - Huntington Beach, CA - Enterprise wide Agenda Plus, Minutes Plus, Video Streaming integration, Forms and Workflow, Electronic Document Management, SIRE Pub
> - Irwindale, CA - Electronic Document Management, SIRE Pub
> - Lake Elsinore, CA - Enterprise wide Agenda Plus, Minutes Plus, Forms and Workflow, Electronic Document Management, SIRE Pub, Conversion
> - Lake Forest, CA - Enterprise wide Agenda Plus, Minutes Plus, Forms and Workflow, integration with Documentum
> - Mission Viejo, CA - Enterprise wide Agenda Plus, Minutes Plus, Forms and Workflow, Electronic Document Management, SIRE Pub, Conversion

- ➢ Moorhead, MN - Agenda Plus, Minutes Plus, Video Streaming, Forms and Workflow, SIRE Pub
- ➢ Port Hueneme, CA – Hosted Enterprise wide Agenda Plus, Minutes Plus, Forms and Workflow, SIRE Pub
- ➢ Richmond, CA - Enterprise wide Agenda Plus, Minutes Plus, Video Streaming, Forms and Workflow, Electronic Document Management, SIRE Pub
- ➢ San Bernardino County, CA - Enterprise wide Agenda Plus, Minutes Plus, Forms and Workflow, Automated Post Meeting Processes
- ➢ San Diego, CA - Enterprise wide Agenda Plus, Minutes Plus, Forms and Workflow, SIRE Pub
- ➢ San Diego Retirement, CA - Enterprise wide Agenda Plus, Minutes Plus, Video Streaming, Voting Plus, Forms and Workflow, SIRE Pub
- ➢ San Bernardino County Pension Group, CA - Enterprise wide Agenda Plus, Minutes Plus, Forms and Workflow, Electronic Document Management, SIRE Pub, Conversion
- ➢ San Jacinto, CA - Enterprise wide Agenda Plus, Minutes Plus, Forms and Workflow, Electronic Document Management, SIRE Pub
- ➢ Santa Clara, CA - Enterprise wide Agenda Plus, Minutes Plus, Video Streaming, Forms and Workflow, Electronic Document Management, SIRE Pub, Conversion
- ➢ Wake County, NC - Enterprise wide Agenda Plus, Minutes Plus, Forms and Workflow, SIRE Pub
- ➢ Westerville, OH - Agenda Plus, Minutes Plus, SIRE Pub
- ➢ Winston-Salem, NC - Enterprise wide Agenda Plus, Minutes Plus, Forms and Workflow, SIRE Pub
- ➢ Mesa County, CO – Active Review
- ➢ Clark County, WA – Active Review
- ➢ City of Lethbridge, AB Canada – Active Review

- **The vendor must have a proven commitment to quality in software.**

SIRE Technologies' solution suite has proven to provide some of the World's best of breed applications -- according to three leading independent panels. Three organizations, The Enterprise Content Management Connection, Software and Information Industry Association and the Public Technology Institute, have all independently acknowledged SIRE Technologies' products as some of the best available.

The Enterprise Content Management (ECM) Connection pronounced SIRE among the top 5 in the government category of its annual ACE awards. The award is designed to honor companies' noteworthy achievement across three criteria: Appeal, Content, and Education.

The Software and Information Industry Association (SIIA) also ranked SIRE Electronic Content Management Systems among the top five "Best Document Management Solutions" for 2007 and 2008. These awards celebrate achievement and vision in software, education technology and digital content.

And thanks in large part to its implementation of SIRE Technologies; San Carlos, California is the proud winner of the Public Technology Institute's Technology Solutions Award.

The Center for Digital Government is a national research and advisory institute on information technology best practices and policies. Each year, the Center conducts numerous surveys and grants several awards to innovative leaders in the digital government movement. This award adds validation that SIRE Technologies is well qualified to implement a fully integrated Agenda Management solution for the City.

However, we also know that strong customer service, which includes standing behind our products, can mean more than awards. At SIRE, we pride ourselves on developing and maintaining strong client relations. Our numerous references can attest to this.

Here is what some of our customers have said:

> *"Excellent products & service. The SIRE team is focused on customer satisfaction & service. SIRE listens to their customers & acts to improve products to meet customer needs." (Bev Burke, City of Lethbridge)*

> *"SIRE is very customer oriented. Even though my organization has a small support staff I feel like SIRE is part of my team supporting our users." (Alan Kelley, Oklahoma State)*

> *"I would like to say that the support Temecula has received from your technical staff has been truly superb. These were very complex tasks and we could not have accomplished them without the expertise of [SIRE Technologies]." (Tim Thorson, Information Systems Director, City of Temecula)*

> *"SIRE listens to the customer and is willing to implement new ideas whether to existing software or projected thoughts and practices." (Robin Judd, Summit County)*

> *"No matter where they are, what they are doing or what day of the week it is, SIRE is always there to help us when we need it the most." (Michael Ramirez, City of Ventura)*

> *"Every person from SIRE we have dealt with, from our initial contact with the sales consultant to the installers has had the same upbeat, can-do, no-problem attitude. SIRE makes us feel as if we were their only client." (Jeanne McAferty, Chief Deputy Clerk, Johnson County Government)*

- **Development and customer service (as evidenced by a high customer retention rate, regular product upgrades, and trouble-free transitions to new software versions, for instance).**

Any company can claim to be the best. SIRE proves it with an unbeatable history of excellence in delivering outstanding solutions in document and agenda management while earning a reputation for delivering unparalleled service. SIRE enjoys a client retention rate of 95%.

Enhancements and release components are prioritized based on client need. SIRE designed its solutions from the ground up for use with city and county government. Every solution as well as version upgrades

are driven by a steering committee comprised of appointed and elected government officials from state, county and city government bodies.

Regular client requests are compiled at the annual SIRE RoundTable™ user's conference and are evaluated by SIRE development for financial and technical feasibility before being added to the product the following year. On average, SIRE puts into practice 80% of client recommendations and applies the functionality to the next product upgrade, which is available to every client.

Throughout the year, clients also send enhancement requests or require various new functionality to finalize a contract. New functionality initiated from new contracts is made available to all clients in subsequent software releases following the release to the contracted client.

SIRE has proven throughout the years to be on the cutting edge of emerging technologies and new automated features and functions that have benefited tens of thousands of users in state and local government. Some of the items in development for the next 2 releases are:

- Focus on Mobile Applications - Ipad, Android, Windows Mobile: Full access to all SIRE functionality including: Workflow & Forms. Mobile upload, access and viewing.

- The next release titled MR3 is due to be released towards the end of June, 2012.

- Improvements to Office integrations including full features from within Outlook (single interface to everything SIRE offers from inside outlook).

- Enhancements to current SharePoint integration.

- Cloud based feature integrations, Office 365, GoogleDocs, etc.

SIRE notifies its users when new product versions have been released, and provides upgrade support where needed. All software upgrades are provided as part of the maintenance agreement, and are free of any additional charge.

SIRE historically releases one major version upgrade once per year, as well as a number of Service Pack releases each year that bring improved functionality and performance to the SIRE system. Phone support for installing all updates is included in annual maintenance fees.

Overall Primary System Requirements

1. **General System Specifications, Compatibility and Integration:**
   - **The proposed solution must be a single system developed and supported by a sole vendor offering all the elements necessary to meet the requirements outlined in this scope.**

SIRE prides itself on being a single vendor solution and can offer all elements necessary to meet the City's requirements as outlined in this RFP.

   - **The proposed solution must be entirely scalable to meet the City's expanding needs over time.**

The SIRE solution is modular, making it very scalable. Modules can quickly and easily be added when the City is ready.

   - **The proposed solution must be easily integrated with the City's existing computing infrastructure, which is described below.**

Integrations are a strong point of the SIRE product, and we seamlessly integrate with the City's existing technical environment as outlined in this RFP.

2. **System Availability, Security and Performance:**
   - **The system must have a demonstrated 99.9% uptime.**
   - **The system must be responsive, with no long delays or pauses due to system slowness when completing tasks.**

SIRE fully complies with these requirements assuming the City meets the recommended infrastructure and hardware specifications as outlined in this RFP and by the discovery team during the initial implementation process.

3. **System Administration:**
   - **System security and authorization settings must be easily managed by a designated administrator without the need for additional programming.**
   - **The system must allow the administrator to define user and group rights.**

The SIRE solution allows administrators to define user and group rights as well as designate other authorization settings without the need for additional programming. SIRE Administrator is SIRE's command center and application administration console. SIRE Administrator is the application used by administrators to manage administrative tasks for the SIRE Solutions Suite. It allows you to perform tasks such as:

   - Understand basic installation requirements
   - Become familiar with the SIRE Administrator console and the various administration tools
   - Create and configure cabinets and indexes
   - Learn the essentials of SIRE security
   - Set up users, user groups and permissions
   - Create annotation layers and set security for them
   - Become familiar with the different SIRE services and how to work with them
   - Become familiar with and configure the various SIRE settings
   - Work with SIRE statistics and reports.
   - Adding and modifying users, security groups and permissions
   - Adding cabinets, fields and indexes
   - Checking statistics, working with logging and modifying system settings

• Manage SIRE Agenda Plus

Here is a brief explanation of each tool found in your SIRE Administrator Console.

❖ *Licensing:* Allows you to view your SIRE license levels and monitor current connections to SIRE.

❖ *Settings:* Allows you to configure system settings such as system mail options and full text search settings. Under Settings, you can also set your logging options.

❖ *Services:* Allows you to monitor and work with SIRE services.

❖ *Vault:* Allows you to create and manage cabinets and cabinet views.

❖ *Indexes:* Allows you to add and configure indexes.

❖ *Security:* Allows you to set up and modify SIRE security items such as user accounts, user groups and permissions.

❖ *Statistics/Reports:* Allows you to get a files and folder count for any cabinet and search system logs and user activity logs.

❖ *WebCenter Settings:* Allows you to configure and modify essential settings for SIRE WebCenter.

SIRE Administrator has a reporting option that can give you useful statistics and reports to help you manage your SIRE system, security and staff productivity. To use the report options, you must have logging turned on under Settings. Here is a brief explanation of the different options available:

❖ *Folder/Files Count by Cabinet:* This option returns a statistical report showing all SIRE cabinets and the number of files and folders in each.

❖ *Search System Logs:* When logging is enabled, this option allows you to search the system logs within a specific date range to monitor actions such as adding, deleting, printing and viewing.

❖ *Search User Activity Report:* When logging is enabled, this option generates a report showing each user and the number of times they have printed and viewed any item in FileCenter.
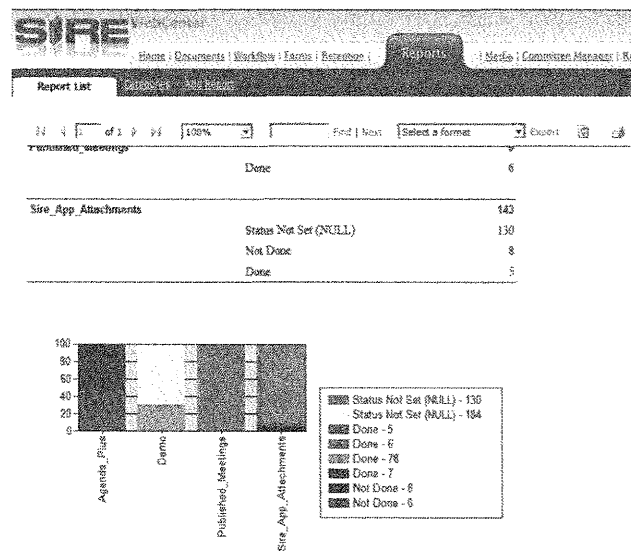
Standard reports include but are not limited to:

• User activities including logging in, printing, viewing, editing, deleting and other user tasks
• Number of folders and files by cabinet
• Security groups and user lists
• System settings

* Index and cabinet lists
* Standard reporting tools such as Crystal and Cognos can also be used to access data from the SIRE system

4. **Server requirements should be Windows based utilizing a Windows SQL (or other comparable) database solution for the EIMS application.**

SIRE fully complies with this requirement.

5. **Server(s) and licensing will be the property of the City of Wasilla and all software, licensing, images and data must reside on equipment owned and operated by the City of Wasilla.**

SIRE fully complies with this requirement.

6. **The EIMS server and client workstation licensing must coexist with current City of Wasilla network hardware and utilize existing services such as backup, firewall security, authentication and virus protection.**

SIRE's implementation team ensures our solution works efficiently with the City's network hardware and utilizes all required security services.

7. **The EIMS system must be capable of operating in an enterprise networking environment.**

SIRE fully supports this requirement.

8. **The EIMS system must support private and virtual private networking as well as thin client services where required.**

The SIRE solution supports private and virtual private networking as well as thin client services. The system allows users to access the system through virtual private networking and use the web as a thin client.

9. **The EIMS system must support document scanning from multifunction devices and dedicated scanners.**

SIRE fully supports this requirement and integrates with any scanning device that is SCSI, TWAIN, KOFAX or ISIS compliant.

10. **The EIMS system must have high level department and user level access and auditing security features.**

SIRE's solution addresses security at the folder, document, word and annotation levels for both internal and Internet access. Permissions can be set for any actions within the system, including log in, view, edit, email, export, delete, add, check in, check out, save, and print. Permissions can be granted at the cabinet, folder, and annotation levels or you can protect confidential words or paragraphs in individual documents using redaction capabilities. In addition, administrators can control what actions a user can perform on documents within a cabinet. Permissions can be assigned at the group level, or custom permissions can be applied to individual users.

11. **The EIMS system must provide segregated security by department and/or user.**

The SIRE solution allows administrators to assign levels of access to certain individuals or departments.

12. **The EIMS system must provide the ability to create and store images of documents using non-proprietary image formats.**

SIRE provides the ability to create and store images using non-proprietary image formats including TIFF and JPG. Common image formats include: bit-mapped graphics (BMP), graphics interchange format (GIF), joint photographic experts group (JPEG), and tagged image file format (TIFF). Scanned images are converted to a non-proprietary format allowing you to view the image in virtually any image viewer including most web browsers.

13. **Access and security levels consistent with using the WWW to access, send and receive confidential information.**

SIRE controls access to confidential information, utilizing existing security via LDAP and Microsoft Active Directory to enable single login access with your existing network user login.

Interfaces and Integrations
The City of Wasilla uses a number of software applications critical to its core operation and mission. The proposed software solution should interface or integrate with most to all of the following systems:
- **Sungard HTE Naviline financial software;**
- **Tiberon RMS (records management system);**
- **Tiberon CAD (computer aided dispatch);**
- **Past Perfect museum database; AutoDesk; ArcGIS;**
- **Manager Plus (Utilities work order program);**
- **Trims (PW program);**
- **Trees (parks tree inventory program);**
- **Maximum Solutions (sports complex facilities planner); and**
- **CIMS (cemetery plot program).**

Integrations are a strong point of the SIRE product, and we can seamlessly integrate with the City's existing technical environment as outlined in this RFP. This would require initial discovery to determine the cost for delivery. Note that while SIRE has and can implemented an excellent interface any/all of the third-party products listed, the pricing for such is not included in the original quotation provided, nor in the quote attached as each interface is considered on an individual basis through a collaborative discovery process with the client to establish the applicable cost to accommodate that interface.

Because of SIRE's open architecture and API toolkit, it is possible for SIRE to integrate with virtually any other software application. This can be done via thick client integration, thin client integration, API integration, data exchange, and more. Each integration is discussed individually and an appropriate integration solution is selected. The solution can vary based on whether the other application is client based, web based, etc.

Being an open MS Windows solution using industry-standard networks and SQL databases, SIRE is fully compatible with all open system standards.

SIRE has successfully integrated against many other software providers and has established an extensive toolbox for performing both voluntary and involuntary integrations with other products. These integrations range from fixed integration points using our API dlls, Web Services or Command Line interface to screen scraping the interface of other applications for key information. We have a great deal of strength in this area. SIRE's solution provides for HTML or XML data conversions. SIRE has existing clients with integrations to the SIRE document management system that allow the client to gather information from specific areas of the different screens of their applications and pass them to SIRE in order to automatically retrieve documents. Here are some of SIRE's existing integrations:

- Laserfiche – SIRE has an existing integration with Laserfiche that is used in production at multiple client sites.

- CivicPlus – SIRE only requires is an iframe on the existing city clerk's webpage. We have been able to deliver this with numerous other CivicPlus customers.
- GovDelivery – The SIRE solution manages email subscriptions and notifications through built-in RSS functionality.
- Apple iOS products – SIRE has an iOS specific application called Agenda To Go that can be downloaded from the app store.
- Android and Windows mobile smartphones and tablets – SIRE supports these devices for agenda distribution and video streaming.
- Granicus web streaming – SIRE provides its own web streaming solution and will convert your old Granicus files at no cost.
- Microsoft Office 2007/2010 products – SIRE is a gold certified Microsoft partner and we support integration with the Microsoft Office product suite.
- Adobe Acrobat 9/10 products – All supported in the SIRE solution.

Hardware

SIRE can comply with the City's technical environment specifications. Here is more information about server and client technical hardware specifications as well as several different configurations and server strategies that have been proven to work for other client sites. Hardware can be procured by the City through existing hardware agreements.

Application and Database Servers:
This may be one server running both the application and database components or for a large deployment be one server each(DB and Application).

Processor: Dual Intel 2 GB processors

Memory: 2-4 GB for Application Server, Maximum memory allowed if for Database Server.

Storage Space: Minimum of 150 GB storage. For Database Server: 3 separate hard drives (min. 72 GB each) for operating system, data, and log files, or use a larger drive configured with RAID level 5 redundancy.

Operating System: Windows Server 2003/2008 (32 bit).

Other Required Software:

- Microsoft Office or Microsoft Word 2007 (Required for SIRE Agenda Plus).
- Microsoft Visio 2007 Professional (Required for SIRE Workflow).
- Microsoft SQL Server 2000 or above.
- .net 2.0

Recommended Configuration:

For maximum performance we recommend two separate servers, one each for the applications and the database per the above specifications. The documents would be stored using either a SAN (storage area

network) or a NAS (network-attached storage) storage solution. Also offloading the SIREPUB, public access application to the customer Webserver is ideal for maximum performance.

Single Server Configuration:

For smaller sites, a single server can be used for the application, database, and documents. In this case, it is recommended to use faster processors, quad-core, more memory, and separate hard drives to house the applications, data, and documents. Alternatively, the applications and database could be housed on the same server, with documents on a separate server or storage device.

The following example describes how a single server might be set up when using it for the application, database, and document repository.

Drive Configuration:

- Hardware Mirrored Drives (2) for the OS and SIRE application services— Recommend 60-80 GB Drives.
- RAID 5 Drives (4)—Recommend 146 GB Drives.
- Create 1 partition with 2 directories:
    1. database
    2. images (Administrative Share)

External Web Server for Public Access:

In order to provide public access to documents in SIRE, and/or if using SIRE Agenda Plus for creating and publishing agendas and minutes, you should have an external, publicly accessible web server to run the SIRE web applications and SIRE Web services in addition to the internal SIRE application server as designated above. When installing the external web server, you must know the name of the SIRE remoting server and the designated port to access it.

Recommended External Web Server Specifications:

Processor: Dual Intel 2 GB processors

Memory: 2-4 GB

Storage Space: Minimum of 80 GB storage. We recommend a configuration with RAID level 5 redundancies.

Operating System: Windows Server 2003 / 2008

Other Required Software:

1. SIRE Web components (includes SIRE Web Applications and SIRE Web Services).
2. Internet Information Services (IIS) with the following additional components:
    - ASP.NET

Additional SIRE Hardware Considerations:
The following should be considered when determining hardware requirements for the SIRE application.

1. Existing SQL or Oracle DB servers at the customer site can be used if desired to host the SIRE database.

2. If a Virtual (VMware) environment exists, the SIRE Servers can reside on VMware servers.

3. The only exception to the use of Virtual environments is the SIRE Encoding server which is recommended to not run in VMware environments will need to be on a separate server such as the SIRE turnkey system.

4. SIREPUB, the public webserver component of the SIRE application if desired to be used can be placed/offloaded onto the customer's webserver or exist on a separate server.

5. SIRE environments may start with all components (including DB server) on a single server such as the turnkey server if determined to be a proper fit based on requirements. Over a period of time as load and data grows, SIRE components may be distributed and offloaded to several servers (DB, Web, Application,Web). This makes the SIRE application very scalable in response to demand and performance.

SIRE Virtual Machine Best Practices

Virtual environments are a great way to leverage SIRE depending on the size and use of the software. Virtual machine usage depends on what other resources are running virtually on your host sever e.g. Exchange server. As with any virtual process we recommend having a monitoring service in place to make sure you get the best experience from it. The host server should have an appropriate raid array or SAN backed storage. Hardware is recommended to be 2007 that has Intel-VT support or AMD-V support.

Guest environments should be setup with the following minimum specs but may need to grow based upon workload:

Application Server

Minimum 1 Virtual CPU with 2 GB of dedicated memory. We usually will see usage of 1 to 2 GB of fluctuation as SIRE is being used. Depending on what is being stored Minimum of 250 GB thin provisioned of Hard Drive space.

SQL Server

Depending on the load you should be able to start off with 1 Virtual CPU and 2 GB of Memory as well and about 75 GB to 100 GB of hard disk space. With the SQL server we do recommend not thin/dynamic provisioning the disk as it is a performance hit to the disk. Make this disk thick provisioned from the outset. You can also do a 75 GB thin as the C drive and 20 GB for your Database on a separate drive and make that thick.

Web Server

Minimum 1 Virtual CPU with 1 GB of memory, hard drive space is around 75 GB to 120 GB of thin provisioned space.

Specifications may change depending on how SIRE is utilized at the agency. Some level of monitoring of the product is recommended to make sure the specs are not pegged and to ensure your end users have the most optimal experience with the product. If needed you can add virtual cores, as the SIRE product is multi-threaded. This will also enhance the end user experience. Memory can also be added as needed.

Some customers have combined the application server and the web server and have had completely successful results utilizing 1 virtual CPU and 2 GB of memory. However, we would recommend making the web server in the DMZ if possible for security reasons.

Please find our architecture diagram below:
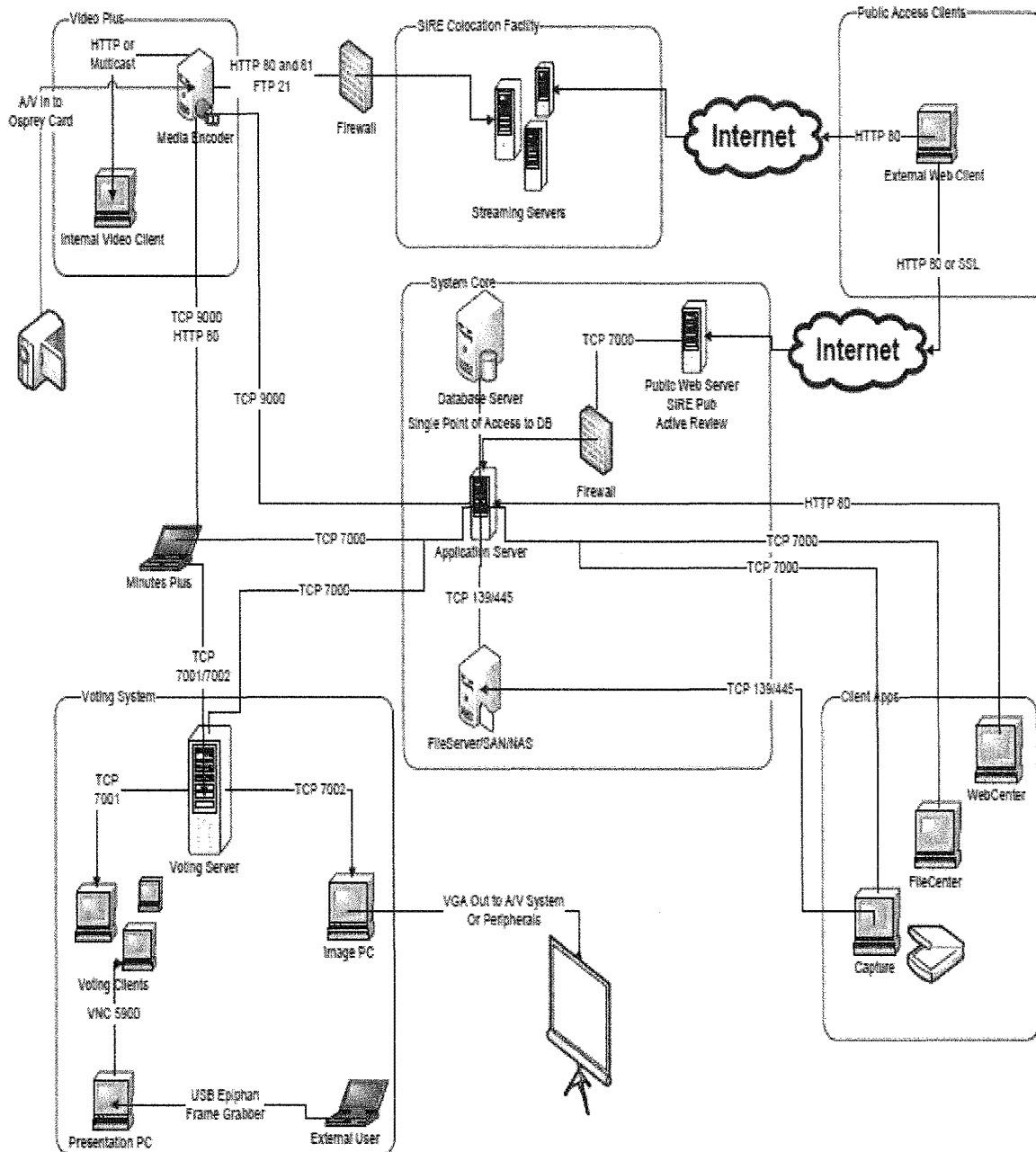
Implementation

SIRE can work with the City to design an implementation schedule that meets the needs of both organizations. The City's goal of being fully operational by December 30, 2012 is reachable barring any major change orders or necessary hardware purchases by the City.

SIRE Technologies works closely with its clients to create a mutually successful project and implementation strategy. We will collaborate closely with the City of Wasilla team in the project assessment, planning and ongoing status reporting process.

SIRE eliminates the risk associated with implementing an IT initiative through its proven and effective implementation procedures developed over the years. Evidence of this claim is testified by SIRE's nearly 100% client retention rate. Implementation includes significantly more than just installing software and training users. Mission critical elements such as user adoption, departmental champions, and roll out schedules are taken into consideration.

SIRE Technologies utilizes proven project management tools to manage its project life cycles (Initiate, Plan, Execute, Control, Close) successfully.

SIRE Project Management Tools:

Sales Hand-Off Document
- Organization
  - Sponsors, Stakeholders, Key Persons
- Project Description
- Departments Involved
- License, Service Breakdown
- High-level Project Timeline
- Scope of Services
- Functional Requirements (RFP)
- Development Needs
- Purchase Order / Contract
- Payment Milestones

Project Plan
- Project Overview
- Project Scope Statement
- Project Deliverables
- Project Assumptions
- Project Constraints
- Project Roles and Responsibilities
- Communication Plan
- Risk and Asset Management
- Issues and Change Management
- Milestones / Payment Milestones
- Baseline Schedule
- Testing and Acceptance
- Project Acceptance & Sign-offs Identified
- Out of Scope

* Possible Future Plans / Projects

Communication Methods
1. Weekly Status Meetings
2. Meeting Agendas / Recaps
3. Project Time Line / Tasks List
4. Action / Task List
5. Issues Log
6. Executive Summary Report

Site Visit Trip Reports
1. Pre–Trip Task Assignment
   * Customer Sign-Off
2. Site Visit Schedule
   * Client Resources/Rooms Required
3. Post Trip Deliverable Rpt
   * Customer Sign-Off

Support Hand-off
1. Meeting to Introduce
   * Provide project background

Lessons Learned
1. Post Project Review
   * Customer Evaluation
   * What Was Successful
   * What Requires Improvement

Implementation Timeline (Sample)

SIRE has included a sample Project Plan located below that delineates the installation and other various activities associated with installing SIRE's Electronic Document Management Solution. The sample project plan is based on SIRE's past experience with other clients with similar requirements for content management and imaging. This is only a sample schedule, although based on the needs of typical state and local government agencies. Exact dates, deadlines, additional tasks, trips, etc. will be discussed, outlined, and agreed upon by SIRE and the agency during contract negotiations.

WORK BREAKDOWN STRUCTURE (Rev00)

WBS	Tasks Items In RED Current Priorities	Task Lead / Resources	Days
1.00	**Project Kick-off On-Site**		5 days
	Kick-off Meeting	City / SIRE Project Team	5
	Define and Agree on Project Documents	City / SIRE Project Team	5
	Project Plan	City / SIRE Project Team	5
	WBS (Work Breakdown Schedule)	City / SIRE Project Team	5
	Change Order Process	City / SIRE Project Team	5
	Action Items Log	City / SIRE Project Team	5

		Issue Management Log	City / SIRE Project Team	5
		Communications Plan (Establish Weekly Status Call)	City / SIRE Project Team	5
		Trip Reports Pre and Post Visit Recaps	City / SIRE Project Team	5
		☐ On-site Schedules	City / SIRE Project Team	5
		Executive Status Report	City / SIRE Project Team	5
		Project Discovery for EDMS / Workflow Requirements	City / SIRE Project Team	5
		Coordinate on-site review/discussions re: EDMS needs	City / SIRE Project Team	5
		Coordinate on-site review/discussions re: Workflow needs	City / SIRE Project Team	5
2.00		**Hardware Environment Setup - Confirm / Install**		2 days
		Application Server (Pre-install MS-Office / IIS / .Net Fraework 2.0)	City - IT	2
		Database Server	City - IT	2
		Image Storage (SAN)	City - IT	2
		Web Server	City - IT	2
		Client Workstations	City - IT	2
3.00		**Server Software Install**	SIRE Implementation	2 days
4.00		**Client Software Install**	SIRE Implementation	
5.00		**Document Imaging Discovery / Analysis**	City / SIRE Implementation	5 days
6.00		**Cabinet Creation**	City / SIRE Implementation	7 days
7.00		**Data Retention**	City / SIRE Implementation	10 days
8.00		**Data Conversion Needs**	City / SIRE Implementation	33 days
9.00		**Workflow / Scheduled Events**	City / SIRE Implementation	5 days
10.00		**EDMS / Workflow Training**		2 days
		Administrative Training	City IT / SIRE Trainer	2
11.00		**End User Training File Center**	City IT / SIRE Trainer	2 days
12.00		**Scanner / Capture / Importing Training**	City IT / SIRE Trainer	3 days
13.00		**Auto-Indexing Setup / Training**	City IT / SIRE Trainer	5 days
14.00		**Workflow Training**	City IT / SIRE Trainer	5 days
15.00		**On-Going Operations & Project Support Hand-off**	City IT / SIRE Project Team	1 day

Training

SIRE fully complies with the City's expectation of having onsite training for four to six employees with follow-up training available via webinar if necessary. Here are some more details about SIRE training:

SIRE's implementation includes comprehensive training courses, written documentation, workbooks and videos that will allow the City's users to learn at their own pace. SIRE software is not only easy to install, but easy to use as well. As a result, training requirements are much less intrusive and time consuming when compared to other systems. SIRE provides on-site training at the City and we can also provide additional training as requested, either on-site or here at our SIRE training facility in Salt Lake County, Utah. Training for the initial installation of City users is quoted in this response.

In order to ensure the proper training of SIRE users and administrators, we recommend adherence to the following guidelines:

* We recommend that at least two individuals be trained as SIRE Administrators.
* We recommend not more than two people per workstation during training classes to ensure adequate levels of hands-on experience for each participant.
* Class sizes for User courses are not to exceed 10 participants.
* Class sizes for Administrator courses are not to exceed 4 participants.

System Administrator Training

We recommend that at least two individuals be trained on system administration. One would be the primary system administrator and the other would be the secondary or backup administrator.

Training really starts during the installation process. SIRE project team members frequently discuss and include system administrators so they become familiar with all aspects of the system. Then, a number of days of formal training take place.

SIRE provides a SIRE Administrator Certification, which effectively addresses the needs of a system administrator. The SIRE Administrator Certification is designed to provide participants with a deep understanding of the administration components of the SIRE system. The certification begins by covering SIRE Server Specification, server installation and validation to ensure participants competency with the SIRE software installation.
This certification will also train participants on troubleshooting the software and provide answers to specific questions such as re-arranging the order of fields, removing cabinets after documents have been added, starting and stopping services, database indexes, client setups, upgrades and database connections, as well as scanner installation and configuration.

User Training

User training takes place after installation is complete. This is important whether the training is given onsite or at our training facility. Onsite training utilizes the newly installed system. Users can immediately begin using SIRE upon completion of the proposed end-user training.

Train the Trainer

Most successful training models incorporate a "train the trainer" approach. There are no "special skills or traits" needed for a staff trainer. All that is needed is to establish a staff trainer who is competently trained and designated as a system user expert to whom other users can go for assistance and additional training. Thus the trainer will naturally need to be one who is comfortable and confident with helping others within their organization and is skilled at communicating.

Instructional Methods

Training is entirely hands-on. Up to two people sit at each workstation with a maximum enrollment of ten individuals (somewhat flexible). Our basic training model consists of these four parts:

* Explain – The instructor offers students an explanation of the concept and its possible applications
* Demonstrate – The instructor shows students exactly how to perform the operation or how the concept works
* Practice – The students practice the concept using SIRE
* Evaluate – The instructor and students review the concept and practice performance. This gives students a chance to ask questions and give input

Additional Ongoing Training Opportunities

Live Classroom Presentation

SIRE provides live, in-depth hands on, class-room style training to aid agencies in maintaining a fully trained workforce, as well as provide training options for new employees. This instruction is conducted at our main Salt Lake District location in the form of Focus Trainings. Clients interested in attending these trainings can get more information by checking the live training schedule online at:

http://www.siretechnologies.com/OurEvents/ClientTraining.aspx

Live training is also available on site at your location. Please contact a training representative for additional information about our on-site training options.

SIRE Online Portal

SIRE Technologies' website offers many tools and resources for SIRE clients. SIRE allows you to choose a learning format that fits your organizations needs as well as your personal learning style. Depending upon the certification track you participate in, you can receive training through either one, or a combination of the following learning environments. Software upgrades and patches are available for download from the company website.

The following online training options are available through SIRE:

* Live Weekly "Webinar" Training
* Recorded/On-Demand "Webinar" Training
* Online Video Tutorials
* Online student forums
* Computer-based Certification Assessment

Video Learning Library

SIRE provides a comprehensive list of video tutorials covering every aspect of the SIRE product suite. The videos are available to clients at no charge and provide an excellent way for new users as well as existing users in need of a refresher course to learn the product at their own pace.

"Webinar" Training

SIRE provides live instructor led online training covering, best practices and continuing education support via web conferencing. All SIRE classes will be available online for clients who have attended any of the live training options listed above.

Recorded/On-Demand "Webinar" Training

SIRE provides recorded versions of all webinar trainings available on-demand. This support training allows continuing education at a time convenient to the participant.

Online Student Forums

SIRE offers moderated student forums. Certified SIRE instructor's moderate student forums that offer best practice advice, support, certification exam help, training tips and user help for all certification tracks.

Documentation

SIRE fully complies with the City's expectation for software documentation. As part of the Maintenance Agreement SIRE provides the following documentation in both written and on-line formats for all new clients:

- User Guides for all purchased products.
- System Administrator Guides for all purchased products.
- Training materials for all training sessions.
- Quick Reference sheets for the relevant products.

Upon award of contract SIRE will provide one hard copy and one modifiable electronic copy of all documentation to the Authority, which you are able to reproduce. With each new release, clients will get the latest user and administration guides in electronic format on the SIRE product CD. All documentation is also available through the SIRE website.

The manuals are constantly updated to reflect the latest changes in the product suite. A list of manuals currently available for the SIRE Document Management suite of products is listed below:

General Documents/Reference Manuals

7. SIRE Auto Indexing Cheat Sheet - Version 5.0

8. SIRE Patch Code Example

9. Hardware Architecture Diagram

10. Best Practices for Creating File Cabinets

11. Future of the File Cabinet - A Guide to Electronic Document Management

PDF Documentation for SIRE Version 6.0:

4. SIRE Content Management Administration

5. SIRE Reporting Services Administration Manual

6. Capture User Manual

7. Content Management Administration Manual

8. FileCenter User Manual

9. 6.0 Release Notes

10. System Administration Manual

11. Viewer User Manual

12. WebCenter User Manual

License Structure

SIRE offers both individual concurrent Client Licenses as well as a site license.

Concurrent Client Licenses: SIRE uses the concurrent license approach for our Client Licenses. This has provided the most economical approach for our clients in the past. SIRE also offers price breaks for larger numbers of licenses purchased. SIRE typically uses a 3:1 ratio to determine the number of licenses actually needed.

SIRE does not differentiate between our thick and thin installations for Client Licenses. One license will accommodate both, thereby reducing the number of licenses needed by the client. Furthermore, SIRE does not add to the cost of our Client license when additional functions are required such as Workflow, Retention Manager, eFORMS, etc. The same affordable Client license will allow the end user (with permissions) to use any of the EDMS's functions.

Site License: SIRE also offers a site license that allows any number of concurrent users to access the system. With larger installations in the past, we have learned that above a certain number of users, it is more economical to purchase the site license than individual client licenses. Although this licensing approach is not included in the price quote attached hereto, we can discuss the costs associated with this at your request.

SIRE Hosted Solution Option: Solutions can be located off-site at a SIRE server farm, where they are constantly monitored by SIRE technicians. This option decreases the hardware cost of installing a new SIRE system on-site, and the maintenance costs of administering the server. Additionally, records, applications, and settings can be safeguarded in the event of man-made or natural disasters, because all hosted solutions benefit from SIRE's Disaster Recovery Strategies.

Price breaks are offered for all licensing options at reasonable intervals.

Maintenance and Support

SIRE personnel provide all maintenance and support for supplied software. SIRE endeavors to provide service that is single-source and immediate. SIRE is a user and administrator-friendly system that requires very little maintenance once the database is set up initially. Phone support for installing all updates is included in annual maintenance fees.

Your assigned implementation specialist and the SIRE support staff will provide all technical support during implementation. Your project manager will track any issues during implementation to ensure timely resolution. After system go-live, support and issue tracking will transition fully to the support staff.

A hotline and/or SIRE Web support is available for all system difficulties during the agreed to support hours. Most software problems can be solved through the use of either telephone support or a Web logon within a very short period. SIRE support is unique in that there is direct access to the software developers of the SIRE software, avoiding the necessity to deal with remotely located third party developers.

SIRE uses Maintenance and support tracking software. As a problem is addressed at the SIRE support desk, the problem is entered into the database along with the customer and case information.

SIRE Maintenance Tracking Software has a database that can be accessed to track any frequent complaints or any known issues in order to keep our support knowledgeable and to have fast responses to our customers. Audit and reporting features keep the support personnel up to date on any known issues for support.

SIRE Website has current FAQ questions for our customers as well as download locations for SIRE Admin and User Manuals. This site also has the SIRE products and recent customer installations available for our customers.

The initial software warranty period is 90 days. All maintenance and support services available during maintenance are also available to the client during the warranty period. The following maintenance options are available.

Level One – This maintenance level provides support five days per week, twelve hours per day excluding recognized holidays.

Level Two – This maintenance level provides support five days per week, 24 hours per day excluding recognized holidays.

Level Three – This maintenance level provides support seven days per week, 24 hours per day.

SERVICE LEVEL	DESCRIPTION	COST
Software Maintenance Level I	Provides the customer with the following: • Telephone technical help-desk support provided 5 days per week, 12 hours per day between the hours of 6:00 am to 6:00 pm Mountain Time. • Error correction such as correcting any non-conformity of the software to the functionality description set forth in current SIRE product documentation. • All upgrades and enhancements of the licensed applications released by SIRE during the term	20% of the current list price annually for all licenses.

SERVICE LEVEL	DESCRIPTION	COST
	of the SIRE Software Maintenance Agreement.	
Software Maintenance Level II	Provides the customer with the following: • Telephone technical help-desk support provided 5 days per week, 24 hours a day. • Error correction such as correcting • All upgrades and enhancements of the licensed applications released by SIRE during the term of the SIRE Software Maintenance Agreement.	27% of the current list price annually for all licenses.
Software Maintenance Level III	Provides the customer with the following: • Telephone technical help-desk support provided 7 days per week, 24 hours per day. • All upgrades and enhancements of the licensed applications released by SIRE during the term of the SIRE Software Maintenance Agreement.	36% of the current list price annually for all licenses.
Annual Escrow Account for Software Code	Provides a secure, 3rd party location where SIRE source code is stored in the event SIRE becomes insolvent. Uses an existing escrow account. If the client wants to use their own, additional fees will be assessed. Inquire before quoting.	$3,000 $2,000

Software maintenance is provided as part of all levels of support and provides the following services to users:

FACTOR	INCLUDED	OPTIONAL
Unlimited Email Support	✓	
Unlimited Phone Support	✓	
Online Support Ticket Submission & Resolution Tracking	✓	
Download of User & Administrator Guides	✓	
Software Upgrades	✓	
Phone Support for all Upgrades	✓	
Submission of Feature Requests	✓	
Service Packs	✓	
Online Reports Library	✓	
User Forum	✓	
Client Webinars	✓	

FACTOR	INCLUDED	OPTIONAL
24/7 Support		✓
Annual User Conference		✓
SIRE University		✓

Support Escalation Procedures and Personnel

Our normal support hours are from 6 am to 6 pm mountain standard time 5 days a week. Additional support can be purchased outside of those times for additional cost. Our escalation procedures consist of the following:

- Initial call to support. Determine what the issue might be.

- If initial trouble shooting cannot solve the problem. Depending on the support person's expertise other more experience support personnel are brought in. Support personnel consists of Roger Wolsey, Luis Martinez, and Ben Haddock.

- If the problem can still not be resolved it is brought to the Operations Manager, Kyle Young.

- If the system is down and it still cannot be resolved, development is brought in to help figure out the problem. Head of development is Dustin Butler.

- If it is determined that the issue is a bug. Depending on the criticality a developer is assigned to fix the bug and deliver it to the customer. If it is non-critical it scheduled as part of a patch or release.

- Support personnel have access to developers to answer and work issues as required.

Our help desk personnel range in experience. They are all trained on the product and have different levels of expertise based on experience and time with the company. Our philosophy is to take care of the customer and do what it takes to make sure things are working properly.

Software Versioning

SIRE provides for versioning and system growth. The SIRE Technologies road map for future enhancements and product features is driven heavily by our clients' requests for specific functions that will enhance a current module or provide a more streamlined solution for a process. SIRE's commitment to city and county government provides for our focus to develop products that meet the needs of this market segment. Generally, the enhancements requested by a client have an overriding benefit to other customers because many provide the same services. We develop and work with clients specifically to address a single client need as well through professional services.

Enhancement requests can be generated in many ways:

1. Project Implementation Enhancements – based on deliverables defined at contract.
2. General Product Usage Enhancements – many times, through standard daily usage our clients will relay a need for less key strokes or an area where they be going to two screens and it would save time for a functionality to be available in multiple places. These can be communicated through our support phone or email portal.
3. Group Polling Enhancements – SIRE will regularly poll its users that are in attendance of SIRE User Groups and will provide the list for review and rating by our clients. This provides for the users to identify based on vote what are the priority of the enhancements.

The ultimate decision of what it included and when is the responsibility of SIRE's Product Team. This team meets weekly to review the list and to continue to prioritize and determine the timely inclusion of the requested enhancements. The request for paid enhancements will take priority.

SIRE notifies its users when new product versions have been released, and provides upgrade support where needed. All software upgrades are provided as part of the maintenance agreement, and are free of any additional charge.

SIRE historically releases one major version upgrade once per year, as well as a number of Service Pack releases each year that bring improved functionality and performance to the SIRE system. Phone support for installing all updates is included in annual maintenance fees.

Our Products: An Overview

SIRE can help the City reach its desired goals through our electronic information and agenda management solution. We pride ourselves on helping government organizations like the City achieve their goals of evolving into paperless, environmentally friendly organizations with the increased benefit of a user-friendly, customizable system that can grow and adapt to changing needs. Below is a table that contains the SIRE products for the City's consideration. Thank you for allowing us to share our product suite with you.

PRODUCT	FEATURES	BENEFITS
SIRE Agenda Plus™ *Manages every step of the agenda-creation and meeting management process, including creating meetings, managing approval of agenda items and related materials, searching meeting documents, and much more.*	• Enterprise Solution • Supports Item Attachments • Supports Multi-level Approval Process • Summary Creation • Optional Streaming Video • Preset Meeting Types • Meeting Locator • Compile and Formatting Tools • Full Text Search of Minutes, Agendas, and Summaries • Workflow • Modular Design • View • Schedule Meetings • Add Items • Attach Actions, Files, Notes etc. to an Item • Continue an Item • Move an Item • Create a printable version the Agenda • Publish the Agenda, Action Summary, Minutes with links to supporting material • Schedule Meetings • Create an Agenda Packet • Scan an Attachment to an Agenda Item • Take Minutes, Motions, Votes, Roll Call • Control Security to Meetings and Items	• Reduce Time and Cost of Creating and Managing Agendas • Add, View, and Approve Items from Your PC • Input Items Only Once • Electronically Attach Files Including Staff Reports • Auto-Generate Agendas • Record Meeting Minutes • Distribute Agendas Without Photocopying • Search Agenda Content for Keywords and Phrases • Work with Agendas Directly from Your Document Management System • Control Security as Needed • Web-Enabled • Work on the Agenda Simultaneously • Easy Publishing of the Agenda with Supporting Material Links • Ability to see the Agenda being created and what is coming • Formatting is consistent • All Information is Searchable
SIRE Video Plus™ *Easily time-stamp and index your*	• Live or Delayed Streaming • Video Linked to Agenda Items, Minutes, and Supporting	• Easily broadcast meetings and other public events via the Internet • Allow constituents to access their government

PRODUCT	FEATURES	BENEFITS
recordings, and make them available to the public immediately at the click of a button. Even record an entirely independent meeting within a meeting.	Material • Jump To Feature • 24/7 Access • Customizable Web Interface • Local or Offsite Hosting • Secure Backup • IE7 and Mozilla Firefox Compatible	24/7 with nothing more than a computer and Internet access • Stream meetings as they happen or record them and publish to the web together with the meeting minutes, supporting materials and the meeting agenda if desired • Video, minutes, meeting agenda and supporting material are all in a searchable format • Quickly locate recorded meeting segments through key word searches • Set user access rights • Local and offsite hosting of web content is available • Configurable web template that easily fits into your existing website • Requires less hardware than its competition by eliminating the need for a media vault • Supports Multicast Broadcasting
SIRE Minutes Plus™ *Easily record roll call, speaker notes, motions, and votes.*	• Single Simple Interface • Easily Make Ad-Hoc Changes • Record Roll Call, Motions, Votes • Meeting Within A Meeting Capability • Summary Creation • Compile and Formatting Tools • Full Text Search of Minutes, Agendas & Summaries • Fast and Easy Web Publishing • Web Based • Controlled Access	• Flexibility of recording a variety of motions and updating roll call on the fly through a single, simple interface • "Meeting within a meeting" functionality makes it easy to keep up with events without losing pace • Minutes are quickly published to the public website with a push of a button • Agenda items are automatically linked to its supporting materials (if any) and linked to the video recording • Quicker transfer of large agendas • Find and view past meeting minutes and supporting materials, including audit trails, with an easy to use search engine • Find meeting minutes by topic through key word search on a public interface thereby creating a self- service portal for public requests • Entirely web-based and uses role-based user access rights management
SIRE Workflow™ *Office processes that require the approval, insight, and action of multiple people, departments, or committees can be difficult to manage efficiently. SIRE Workflow automates these processes, creating and managing workflows in real time.*	• Customizable and Automatic Routing • Auto-Notification • Reporting Options • Built-in Approval Options • Tied to Annotations and Revision Control • Resource Management • Exception Handling	• Increase Productivity • Streamline Processes • Balance Workloads Easily • Track Progress Quickly • Improve Organizational Communication • Complete Tasks Quicker

PRODUCT	FEATURES	BENEFITS
	- Highly Customizable - Collaboration Tools - Automated Routing - Supports FORMS	
SIRE Forms™ *So many processes require the use and management of forms, including applications, surveys, information forms, contracts, etc. The SIRE Forms module creates, distributes, processes, stores, and retrieves custom-made forms, all through the online, Web-Center interface.*	- Broad application possibilities - Form Design and Layout Tools - Item Validation - Tied Directly to Document Management System - Submittable Attachment Tool 24-hour Access	- Integrate Forms Management - Enhance Security - Easy Form Create and Design - Increase Organization Productivity - Track Submissions - Improve Customer Service
SIRE FileCenter .NET™ *FileCenter provides an easy interface to access all your files. It has the ability to display files of over 300 formats, even when your computer does not have the application necessary for viewing files of that format installed. SIRE FileCenter.NET also integrates with Record Retention to direct the archiving and disposal of documents.*	- Index Searches: General Index, Cross-Cabinet, Full-Text, Advanced - Full-Text Searches: Keyword, Free-Text, Annotation - Store Documents - View Documents - Print Documents - Email Documents - Open Documents - Annotation with Audit Trail - Export files - Records Retention Manager - Revision Control - Event Manager - Task Manager - Bookmark Files - Folder Packs - Scan-to-Folder	- Fast Document Retrieval - Work Pool Collaboration - Document Portability - Increased Productivity - Reduced Costs - Improved Communication - Reduced Physical Storage Space - Fast, Complete, and Secure Backups - Minimized Liability - Simplified Disaster Recovery - No Lost Files - Flexible Document Security
SIRE WebCenter™ *This module lets you access documents in your SIRE System from any internet-connected computer. WebCenter lets you search, view, print, and email documents online. It also lets you publish documents online to meet public access requirements.*	- Easy-to-use interface - Web Access to SIRE File Center - Authentication - Public Access - Document Management Functionality - Cost Effective Access - Full Text Search - View	- Access Documents Anytime, Anywhere - Enhanced Productivity Through Online Retrieval - SIRE WebCenter as a Universal Solution - No Special Software Downloads or Training - Real-Value Through Access, Portability, Distribution - No Special Software Downloads or Training - Combine Applications into a Single Interface

PRODUCT	FEATURES	BENEFITS
	• Print	
SIRE Capture .NET™ with Auto-Index *This module integrates with your scanners to import documents, files, and records into the SIRE system. It also imports files you already have in electronic format. SIRE Capture.NET can be configured to automatically index and file documents into appropriate folders and file cabinets.*	• High-Speed Batch Scanning • Non-Proprietary File Format • Barcode Recognition • On-the-Fly Quality Control • Auto-Fill (Indexing) • Supports Most Scanners • Multiple Field Types (Indexing) • Masked Fields (Indexing) • Lookup Fields (Indexing) • Stored Procedures (Indexing) • Front-End Data Validation (Indexing) • Full Keyboard Control • Scan to Folder	• Fix Problems Associated with Paper Processes • Turn Paper Documents into Electronic Files • Complete Document Capture Solution • Retrieve Information Online • Make Information Portable • Enhance Speed, Control, and Flexibility • Broad Scanner Support
SIRE Workflow and Forms™ *Office processes that require the approval, insight, and action of multiple people, departments, or committees can be difficult to manage efficiently. SIRE Workflow automates these processes, creating and managing workflows in real time. So many processes require the use and management of forms, including applications, surveys, information forms, contracts, etc. The SIRE Forms module creates, distributes, processes, stores, and retrieves custom-made forms, all through the online, Web-Center interface.*	• Customizable and Automatic Routing • Auto-Notification • Reporting Options • Built-in Approval Options • Tied to Annotations and Revision Control • Resource Management • Exception Handling • Highly Customizable • Collaboration Tools • Automated Routing • Supports FORMS • Broad application possibilities	• Increase Productivity • Streamline Processes • Balance Workloads Easily • Track Progress Quickly • Improve Organizational Communication • Complete Tasks Quicker • Integrate Forms Management • Enhance Security • Easy Form Create and Design • Increase Organization Productivity • Track Submissions • Improve Customer Service
SIRE Committee Manager *Clerks can now easily track the term of committee or board members, who appointed them, if they can run again, the different*	• Track Terms and Appointments • Store and Retrieve Detailed Information • Web Based	• Instant Access to Committee Members information. • Authorized users may access information from any browser. • Allows updated information to be input during

PRODUCT	FEATURES	BENEFITS
positions someone has served in, and what accomplishments they had while in office. The SIRE reporting capabilities provide an easy way to search and find detailed information about a committee, council or board or one of its members - past or current. SIRE Committee Manager™ is easy to install and maintain, and is entirely web-based.	• Configurable Values • Customizable Interface	meetings • Provides integration with other SIRE products such as Agenda Plus Meeting Automation Systems • May be purchased as a "Stand-Alone" Module. • Easy to use and to maintain.
SIRE Document Viewer *The SIRE solution includes a universal viewer that views over 300 file formats. A system that will support all file formats must also have a universal viewer built in. The viewer works with the EDMS client and can also work when viewing from the web interface. This viewer does not require the native software to view the files or images.*	• Viewer is included with any SIRE Client Server Licenses • Viewer is updated annually to provide new software module interfaces • If the viewer receives a file that it cannot view, such as a video or sound file, it will automatically look for and launch the native application with no user intervention, if the user has the required permissions to do so.	• Easy to use, even for casual users • View over 300 different file formats without the native software • Easy printing from the SIRE Viewer. • Prints with or without annotations. • Viewer furnished with every SIRE FileCenter Client • Viewer can be used with SIRE Web client.
SIRE Record Retention Manager™ *This module schedules maintenance and disposal of records, files, and documents stored in your SIRE system. Retention guidelines are automated to meet audit and public access requirements.*	• Manage retention for both electronic and paper documents • Tackle legal requirements for retention according to your specific organization • Use saved searches to quickly set up retention criteria • Work with retention schedules from the same interface you use for other document management tasks	• Storage • Long-Term Integrity • Guaranteed Authenticity • Disaster & Access Security • Fast & Portable Accessibility
SIRE Administrator™ *The SIRE Administrator module performs a variety of management tasks, including statistical reporting, SIRE Utilities, and SIRE Agenda Plus.*	• The Administrator tab lets you access management functions for the SIRE Product Suite, including: Security, Cabinets, Licensing, and Settings. • The Security page within the Administrator tab allows you to view, create, edit, and administer SIRE users • The Cabinets page within the Administrator tab allows you to view, create, delete, configure, and cross-reference SIRE file cabinets, and view, create, delete, and configure SIRE file cabinet views and SIRE file folder indexes.	• By associating users with SIRE Groups allows you to configure a set of permissions and apply them to multiple users by simply adding the desired users to the group. This saves time and energy, because you don't have to set up the same permissions for each individual user. • Administrators have the ability to audit the entire system, including log in, view, edit, email, export, delete, add, check in, check out, save, and print. • SIRE Administrator even has standard statistical and management reporting capabilities. • Permissions can be granted at the cabinet, folder, and annotation levels or you can protect confidential words or paragraphs in individual

PRODUCT	FEATURES	BENEFITS
	• The Licensing page within the Administrator tab allows you to view the current license your organization has purchased from SIRE Technologies, update your licenses, delegate allocation of your license pool to various departments within your organization, and view the current usage of SIRE licenses throughout your organization.	documents using redaction capabilities. • The majority of tasks performed for the management of the SIRE Product Suite are accomplished within SIRE WebCenter, including creating and managing user accounts, security, cabinets, indexes, and system settings.
SIRE Searching *The SIRE Search window lets you perform simple and advanced searches, cross-cabinet and index searches, file description, annotation, and SQL searches. You can also save searches and access previously saved searches. To perform a Full-Text Advanced Search, your SIRE Administrator must first set full-text permissions for both the user and the file cabinet.*	• The SIRE Search Results window displays folders that contain files matching your search criteria. Folders can be displayed in a cabinet or card view, and folder index values edited using the SIRE Search Results window. • The SIRE Files window displays the contents of folders selected from the SIRE Search Results window. Displayed files can be of any format, and can easily be viewed with the SIRE Net Viewer, or within their native applications. • Folders and files stored in the SIRE system can be easily retrieved using any of nine search methods available in FileCenter .NET. All FileCenter searches are accessed through the Search window.	• SIRE Searching is very easy to use and provides instant view of documents. • Retrieve any FileCenter document effortlessly • An Index Search lets you identify files which have index field values that match input search criteria. • Cross Cabinet Searches identify files in a single selected file cabinet, or multiple selected file cabinets, that match designated search criteria. • A File Description Search compares customized file descriptions to input search criteria and returns search results with matching descriptive file names. • An Annotation Search identifies documents with annotation text that matches input search criteria. • A SQL Search compares input string values with specific index fields associated with folders using SQL queries.
SIRE Reporting *SIRE Reports allows users and administrators to monitor actions, status, and operations of various features of the SIRE system, and generate complete reports on these various elements.* *SIRE Version 5.0 comes pre-configured with a number of SIRE Reports, described in detail in the "SIRE Reports List" document available for download from www. siretechnologies.com.* *New releases of the SIRE Solution Suite will feature additional SIRE Reports as customer needs arise.* *Customized SIRE Reports can be created through engagement with SIRE Technologies, or through internal, on-site development.*	• Reporting Services 2000 comes in 2 production editions: Enterprise and Standard. Reporting Services can only communicate with SQL Server instances of the same edition. • SIRE Reports are accessed through SIRE WebCenter. The reports themselves are accessible to users who have been granted access. • The Reports > Reports List page displays all reports in the SIRE system • SIRE is tightly integrated with Microsoft Reporting Services. There are a number of "out of the box" reports available with the product. It is also very easy for SIRE or the customer to create custom reports to reflect their specific data. The reporting interface is managed by the SIRE security model and	• Because of the open architecture in SIRE you can use any third party reporting tools you'd like to interface with data in SIRE. Crystal Reports is frequently used by our customers for reporting. • Standard reports include but are not limited to: • User activities including logging in, printing, viewing, editing, deleting and other user tasks • Number of folders and files by cabinet • Security groups and user lists • System settings • Index and cabinet lists • Standard reporting tools such as Crystal and Cognos can also be used to access data from the SIRE system

PRODUCT	FEATURES	BENEFITS
	the reports are viewed from within the SIRE product. The reporting services integration currently works only if using SQL Server.	
SIRE Security *Security for documents and access is managed by and within individual departments. For example, a specific department can be given permission to view and add agenda items, but individuals within a department can be limited to just viewing. As a result, SIRE's Electronic Document Management System (EDMS) as well as SIRE's Agenda Plus offers complete security for all your meeting and agenda documents.*	• SIRE provides the ability to log and audit system events, such as file access, deletions and process activities, for reporting, analysis and compliance purposes. • Statistics and reporting features allow for user activity reports showing each user and the number of times they have printed, and viewed any item. • System logs allow searching the system logs within a specific date range to monitor actions such as adding, deleting, printing, and viewing of documents or agendas • Reports can be generated and the criteria can be set up to search on all logging parameters. • The reports can also be generated on a date range, on a particular user or group of users, events, cabinets etc.	• Granular security permissions by meeting type to allow admin to restrict or allow access to view, add items, edit items, add or edit meetings, compile meetings, approve/reject items, or move items. • Allows users to be assigned to different security groups, which are authorized to access different sections of the system and different functionality within the sections of the system • Allows security access to different sections of the system to be defined as read-only, read and edit, or no access • Ability to configure security at the system, business function, screen, file, and field level. Restriction is by user, or defined user group for access to private information and related processing • Restrict withdrawal or renaming of an item based on security permissions
SIRE Web Publishing *SIRE WebCenter is the main application used to manage the SIRE Solution Suite, including functions controlling: SIRE Licensing, Application Settings, File Cabinet Structure, File Indexes, Security, Workflow Management and Administration, Forms Management, Retention Schedules, Reports, Agenda Management and Publishing content to the web.*	• SIRE Web Publishing is included in the basic package of SIRE. • Authorized users can post items to the web for internal as well as public viewing. • One Click publishing to the web. • SIRE Security allows public information to be posted to the web.	• There is no additional cost for SIRE Pub • Saves the user a great amount of time to be able to publish items to the web without having to go through the I.T. staff to implement.
Third-Party Integrations *SIRE's open architecture allows us to integrate with virtually any software application. Being an open MS Windows solution using industry-standard networks and SQL or Oracle databases, SIRE*	• SIRE has direct integration with Microsoft Office, allowing you to save Word and Excel documents, Outlook messages, and attachments directly to the system. • Integrations are a strong point of the SIRE product. Because of its open architecture and	• SIRE's solution provides for HTML or XML data conversions. SIRE has existing clients with integrations to the SIRE document management system that allow the client to gather information from specific areas of the different screens of their HTE applications and pass them to SIRE in order to automatically retrieve documents.

PRODUCT	FEATURES	BENEFITS
is fully compatible with all open system standards.	very strong API it is possible for SIRE to integrate with virtually any other software solution. This can be done via thick client integration, thin client integration, API integration, data exchange, and more. • SIRE has developed a full functioning API Tool Kit that will allow integrations with any Open Architecture Application.	• Each integration is discussed individually and an appropriate integration solution is selected. • The solution can vary based on whether the other application is client based, web based, etc. • Some of the Integrations SIRE has accomplished are: ESRI, KIVA, Accela Permits Plus, HTE, Autodesk, Spillman, Banner, JDE, People Soft, Lotis Notes, Simplefile, and many others.

Cost Schedule

Please find SIRE's cost schedule for the City of Wasilla on the following pages. Note that while SIRE has and can implemented an excellent interface any/all of the third-party products listed, the pricing for such is not included in the original quotation provided, nor in the quote attached as each interface is considered on an individual basis through a collaborative discovery process with the client to establish the applicable cost to accommodate that interface.

Quote

SIRE TECHNOLOGIES

Document Management & Agenda Automation
for State & Local Government

INSTALLED (REV4)

TO:	ATTN: Kristie Smithers, City Clerk
	City of Wasilla
	290 E Herning Ave
	Wasilla, Ak 99654
	(907) 373-9050

Date:	January 20, 2012
Expiration Date:	[Date]
Sales Manager:	Rick Haviland

QTY	DESCRIPTION	UNIT PRICE	EXTENDED PRICE	MAINTENANCE	PART #
	HARDWARE				
0	Server PC: Application Server:		PROVIDED BY CITY		
0	Windows Server 2003 or higher		PROVIDED BY CITY		
0	Server PC: Database Sever:		PROVIDED BY CITY		
0	Microsoft SQL Server 2000 or higher		PROVIDED BY CITY		
	SUBTOTAL HARDWARE		$ -		
	SOFTWARE				
	SIRE SERVER CORE				
1	Enterprise SIRE Server Core	10,500.00 $	10,500.00	2,100.00	40050
	SIRE EDMS CLIENT LICENSES				
10	SIRE Electronic Document Management Concurrent User License	750.00 $	7,500.00	1,500.00	40051
1	SIRE Capture Station (Concurrent)	2,495.00 $	2,495.00	499.00	10050
	SIRE AGENDA PLUS LICENSES				
2	SIRE Agenda Plus Concurrent User License	425.00 $	850.00	170.00	110050
0	SIRE Agenda To Go (per workstation)	495.00 $	-	-	110064
	SIRE WAREHOUSE SYNC				
1	SIRE Warehouse Sync (Server License)	7,499.00 $	7,499.00	1,499.80	90054
	SIRE E-MAIL ARCHIVING				
1	for Pop3 Email Clients	3,995.00 $	3,995.00	799.00	80055
	SIRE UTILITIES				
1	QuickShot for SIRE	2,995.00 $	2,995.00	599.00	20052
	SIRE DISASTER RECOVERY/BUSINESS CONTINUATION & REPLICATION				
0	SIRE Replication License (Server License)	5,600.00 $	-	-	700052
0	SIRE Disaster Recovery Annual Storage Hosting Fee per month/year	1.00 $	-	N/A	700051
	SUB-TOTAL SOFTWARE		$ 35,834.00	$ 7,166.80	
	SERVICES				
3	Project Management (Per Day Cost)	1,350.00 $	4,050.00		120063
5	Installation, Implementation, & Testing days (Per Day Cost)	1,350.00 $	6,750.00		120051

2	Cabinet Configuration (Per Day Cost)	1,350.00	$	2,700.00	120055
1	Agenda Template Configuration (Per Day Cost)	1,350.00	$	1,350.00	120054
0.5	Scanner Setup and Configuration (Per Day Cost)	1,350.00	$	675.00	120056
0.5	Website Configuration / Customization (Per Day Cost)	1,350.00	$	675.00	120058
0	Data Conversion (Per Day Cost)	1,350.00	$	-	120064
0	Disaster Recovery Configuration	5,600.00	$	-	120061
	SUB-TOTAL SERVICES		**$**	**16,200.00**	

	ONSITE TRAINING				
0.5	SIRE Agenda Plus Clerk Training - Cost per day.	1,350.00	$	675.00	130056
0.5	SIRE Agenda Plus System Administrator Training - Cost per day.	1,350.00	$	675.00	130057
2	SIRE EDMS System Administrator Training - Cost per day.	1,350.00	$	2,700.00	130058
2	SIRE EDMS End User Training - Cost per day.	1,350.00	$	2,700.00	130059
0.5	SIRE Capture Scanner Training - Cost per day.	1,350.00	$	675.00	130062
	SUB-TOTAL TRAINING		**$**	**7,425.00**	

	EXPENSES *			
0	Travel: Airfare (per trip)	600.00	BILLED AS ACTUAL	
0	Per Diem: Daily expense for Lodging, Car, meals (per day)	200.00	BILLED AS ACTUAL	
	SUB-TOTAL EXPENSES		**$**	**-**

COST OVERVIEW		
Total Cost for Hardware	$	-
Total Cost for Software	$	35,834.00
Total Cost for Services	$	16,200.00
Total Cost for Training	$	7,425.00
Total Cost for Expenses		BILLED AS ACTUAL
GRAND TOTAL	$	59,459.00
PURCHASE INCENTIVE		
TOTAL SYSTEM COST	$	59,459.00
ANNUAL SOFTWARE MAINTENANCE	$	7,166.80

Quotation prepared by:

This is a quotation on SIRE Technologies software, subject to the conditions noted below:

SIRE Technologies Standard Payment Terms: 50% of Software Fees due at Contract Signing; 50% Software Fees due at Initial Installation; Professional Services, Milestones, and Maintenance due at final project acceptance; Proposal is valid for 90 days from Proposal Date unless otherwise specified in writing.

*Travel Expenses will be billed as incurred.

To accept this quotation, sign here and return: _____

Thank you for your business!