STATE OF UTAH "BEST VALUE" COOPERATIVE CONTRACT
CONTRACT NUMBER: PD2082

June 25, 2015

Revision number: Purchasing Agent: Chad Hinds
Phone #: (801) 538-1287
Email: chinds@utah.gov

Item: KOFAX SOFTWARE PRODUCTS, ASSURANCE, TRAINING, TECHNICAL SUPPORT, BEST
PRACTICE CONSULTING & LICENSE MANAGEMENT

Vendor: 22318J Dataimage Inc
3752 West 2270 South
Salt Lake City, UT 84120

Internet Homepage: www.dataimage.net

General Contact: Scott Morgan
Telephone: (801) 746-7822
Fax number: (801) 977-0068
Email: smorgan@dataimage.net

Reporting Type: Line Item

Brand/trade name: Kofax

Price: See Attached Pricing
Terms: Net 30
Effective dates: 02/14/2015 through 02/13/2020
Potential renewal options remaining: None
Days required for delivery: 2 Days
Price guarantee period: 1 Year
Freight: None
Minimum order: None
Min shipment without charges: None
Other conditions:

This is a new Contract with the same vendor.

Solicitation #: ZD15017-1
The administrative fee for this contract is 0.40% and is already included in the contract price.

This contract covers only those procurement items listed. When placing orders, make sure to identify your organization as a
government entity and provide the contract number. It is the responsibility of the ordering agency to ensure that the vendor
is given the correct delivery and billing address. Agencies should return to the vendor any invoice which reflects incorrect
pricing. Other items ordered that are not listed on the contract must be invoiced separately.

State agencies are to place orders directly with the vendor creating a PRC in Finet.

This contract information sheet is subject to change. State Purchasing doesn’t recommend that you print a copy due to the
potential to change. Always view contract information online at www.purchasing.utah.gov

Please contact the Purchasing Agent listed above if you have questions or concerns.
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January 27, 2015

DETAILED SCOPE OF WORK

2.0 Product Requirements:

2.1 Kofax Software Products:
The following products will be available for purchase. (List may not reflect all Kofax products and should not be construed as all inclusive)

• Kofax Capture 9.0 / up Standard & Enterprise
• Volume Licensing
• Kofax Transformation Module (KTM)
• Kofax Total Agility
• Kofax Communication Server
• Kofax ACIS (is now Kofax KCNS)
• Kofax e-Transactions
• Kofax Express
• Kofax Web Services
• Kofax Document Exchange
• Virtual Rescan (VRS)
• Adrenaline (deprecated)
• Xtrata Pro (is now deprecated)
• Kofax supported Utilities
• Auto Import Utility (KIC)
• Kofax Kapow
• Kofax Analytics
• Kofax Capture 10
• KTM 6,
• KTM Unlimited Field Extraction
• Table Extraction and ProAddOn
• VRS Elite
• Dex Auto Import for Kofax Capture Enterprise
• Kofax Capture Advanced Reports

Pricing for software products will be provided in Excel using the following headers; Product, End-of-Life Date(anticipated), List price, Volume Discount %, Net Price, Anticipated, Kofax capture and KTM certifications, Increase/decrease in the coming year, **experienced staff minimum, MM/YY **experienced staff maximum, MM/YY and number of employees currently certified in product that are on staff, not contracted out. (Any deviation from this format may result in disqualification of proposal).

**Explanation:
Experience Min = least experienced in the product (list months/Years)
Experience Max = most experienced in the product (list Years)

Sample spreadsheet

<table>
<thead>
<tr>
<th>Product Name</th>
<th>End-of-Life MM/YY</th>
<th>List Price</th>
<th>Volume Discount</th>
<th>Net Price</th>
<th>as of Dec coming year</th>
<th>Min MM/YY</th>
<th>Max MM/YY</th>
<th>Current # certified Employees in Product Name</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
2.2 Kofax Software Assurance:
Software Assurance must be available for all newly purchased software products as well as those obtained within the first two years of service. This includes currently owned software with proper transfer documentation.
Offeror must provide immediate path for synchronizing the expiration dates of all Kofax Products Software Assurance currently licensed within the State of Utah to expire on a pre-selected date.

Pricing for software assurance products will be provided in Excel using the following headers; Product, List price, Volume Discount, Net Price, Formula. (Any deviation from this format may result in disqualification of proposal)

Sample Spreadsheet

2.3 Kofax Training:
Kofax training will be available in Computer Based Technology as well as at Certified Kofax Training Center(s). Training must be inclusive of certification testing.

Pricing for Training products will be provided in Excel using the following headers; Training product, List price, Discount, Net Price. (Any deviation from this format may result in disqualification of proposal)

2.4 Kofax Technical Support:
Kofax Technical Support will be available during normal business hours (Monday – Friday, 6 am – 6 pm (MST) excluding holidays) by way of telephone, 24/7 Kofax Knowledgebase in addition to Kofax internal partner Knowledgebase via login.

Consultant, while performing installations/upgrades and/or reconfigurations must be available for off-hours support of production systems as needed during upgrades and or reconfigurations to minimize and/or eliminate downtime for end-users.

We anticipate the receiver to go through a problem determination period within call center then be routed to the anticipated expertise in the particular problem area as follows.
The successful vendor must be able to provide the first line of support, which means unlimited telephone support and unlimited remote dial-in support. Respondents are expected to be certified for all supported products and to keep certifications current. The successful vendor, as the first line of support, is expected to be able to answer software installation, configuration, and usage questions. The successful vendor must be able to resolve most problems with the software without assistance and must be certified for KTM and KCNS with a minimum of two installations. The successful vendor must be at least a Platinum partner.
Contractor must provide access to Kofax internal Knowledge base. Contractor must be able to respond within two hours of request during normal business hours. On-site support, if required.

Note: The State of Utah supports multiple installations and all agencies supported may be configured uniquely
2.5 Kofax Best Practice Consulting/Advanced support.

The following services will be made available for purchase and provided by Certified Document Imaging Architects (CDIA+). They will be fully trained in the latest releases of Kofax software releases and Kofax Capture platform products as well as complementary technologies. All consulting services will be on a fee for hourly services rendered basis for the determination of award. All consulting services will be performed on site in the State of Utah. (The following list is not intended to be an all inclusive list but a sample of what may be required)

- Preliminary project survey
- Installations/Upgrades
- Forms processing survey
- Technical review to proposed solution to identify risks.
- Requirements Definition
- Index Validation scripts
- Forms Setup
- Recognition Tuning
- Third party integration
- Custom Validation and Release Scripts
- Custom Module Development

Pricing for Consulting will be provided on a fee for hourly services rendered basis in Excel using the following header; Title, brief description of expertise, hourly rate. All travel is subject to the State of Utah per diem rates. (Any deviation from this format may result in disqualification of proposal)

The State of Utah expects the selected contractor(s) to have expert Kofax installation/configuration/customization experience and skills with:

2.6 Minimum of 3 years Continuous Kofax Certifications through Kofax 10.1 for (min) 3 staff members within Contractors organization.

2.7 Minimum of 4 installations of KTM – Include references from 2 most recent installations. References must include names of individuals from current staff that participated and must note if any work was sub-contracted to third party and why. Attach résumé’s named staff.

2.8 Minimum of 2 staff member within Contractors organization must be certified in KTM6 – Provide proof of certification of all staff certified in KTM along with resume. If more than one exists, please provide.

2.9 Minimum of 3 consulting and/or reconfiguration projects using an Enterprise approach – Include verifiable references from all with a half page to a page summary of findings, goals and accomplishments for each project. References must include names of Contractors staff that participated and must note if any work was sub-contracted to third party and why. Must include verifiable reference name (s), phone number and email address.
2.10 Contractor must provide, no more than half page detailed summary each of 3 most recent Kofax Product installations with integration of third party applications and support. Installations qualified for this section must be completed projects, have been installed and operational for a minimum of 1 year and providing continuous support. Included with Summary must be verifiable reference name(s), phone number and email address.

2.11 Must have strong Object Oriented programming skills, .Net, C++, Java and Regular Expression coding experience integrating & customizing Kofax products. Must provide resumes of staff meeting these qualifications.

2.12 Must have experienced Project Lead(s) with and the ability to work with end users to gather requirements and offer support. Provide two half page summaries for 2 separate completed projects describing how contractor’s assigned Project leadership skills benefited these two projects. Include lessons learned.

2.13 Must be able to work in a professional team environment and have good communication skills. Briefly describe how you manage this with assigned staff.

2.14 Kofax License Management
Management of all State of Utah Kofax product licenses will provide the following.

• Comprehensive record of all licenses.
• Prorate all licenses to renew at the predetermined period of time.
• Provide Annual statement of renewal that demonstrates discounts applied.
• Detailed exception page count report
• A single point of contact for problem/resolution of licenses/invoices.
• A single point of contact for new purchases, upgrade requests, reports or licensing issue.
• Describe how the above would be managed if selected in a paragraph. Detail if process would be manual, automated or a hybrid of both.

3.0 Utah State Department of Technology Services Responsibility:
All requests for new products, consulting services, upgrade or license validation will be performed through State of Utah, Department of Technology Services (DTS) / Software License Management personnel and/or State of Utah, DTS authorized personnel.

Kofax Product(s) Technical support requests will be placed into the states own service request platform and routed internally to certified Kofax Capture personnel employed by or authorized by DTS as a first response prior to escalating to a technical support call.

PROPOSAL REQUIREMENTS AND COMPANY QUALIFICATIONS

4.0 MANDATORY REQUIREMENTS:

• The Contractor’s personnel and subcontractors who work on DTS premises must pass a Utah Department of Technology Services criminal background check each year with each renewal.
• Sub-contractors will be made public and named within the definition of work to be performed at the time of request.
• Defined skill sets are not to be interpreted as a requirement of all Contractor personnel but should be interpreted as being possessed by each individual proposed to provide the services obtained by the State of Utah.
• Telephone interviews are not acceptable.
• Work may be performed remotely and/or onsite depending on the business needs except for consulting. See Section 2.5. No off-shore work allowed.

5.0 OTHER SPECIAL REQUIREMENTS:
All custom applications/integrations/custom release scripts created as a result of this contract becomes owned by the State of Utah in their entirety. All code, documentation, plug-ins, API’s, code compilers will be organized and turned over to the designated personnel upon each project completion.

The selected Contractor will provide an Annual Performance Tuning meeting at the selected location to the State of Utah Department of Technology support staff or assigned personnel. This session will be for demonstrations of new technologies and performance improvement recommendations and will be provided at selected Contractors own expense.

Contractor will provide a quarterly summary of technology support issues, problem resolutions and end-of-life notifications so that the State of Utah Department of Technology Services may make internal support modifications as needed.

6.0 OTHER CLARIFICATIONS:
The expectation is that the proposed contractor will possess the required skills within their organization. These skills are not to be interpreted as a requirement of the qualified contracting firm that may be met by sending multiple individuals, but should be interpreted as being possessed by each individual proposed to provide the services.
Telephone interviews are not acceptable.

Off-shore work is not allowed. All consulting services will be rendered at the Utah location specified. Some telecommuting arrangements may be arranged depending on assigned tasks and need for customer and peer interaction.
On a case by case basis, assigned consultant must be available for off-hours support of production systems as needed during upgrades and or reconfigurations to minimize and/or eliminate downtime for end-users.
FINET COMMODITY CODE(S):
20837-DATABASE
20853-INTEGRATED SOFTWARE
91829-COMPUTER-SOFTWARE CONSULTING
92014-APPLICATIONS SOFTWARE (FOR MINICOMPUTER SYSTEMS)
92019-COMPUTER MANAGEMENT
96430-COMPUTER TECHNICIAN, OPERATOR AND DATA ENTRY PERSONNEL
98522-COMPUTERS, DATA PROCESSING EQUIPMENT, AND ACCESSORIES (NOT WORD PROCESSING EQUIPMENT)

REVISION HISTORY: