On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order is available through GSA Advantage!®, a menu-driven database system. The internet address for GSA Advantage!® is http://www.gsaadvantage.gov

**SCHEDULE TITLE:** Multiple Award Schedule; Large Category: Information Technology; Subcategory: IT Services

**CONTRACT NUMBER:** 47QTCA22D00AJ

**CONTRACT PERIOD:** 7/12/2022 – 7/11/2027

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at www.fss.gsa.gov

**CONTRACTOR:** Document Technology Systems, Ltd.
1729 Portage Trail
Cuyahoga Falls, OH 44223
Phone number: 888-606-1260
Fax number: 330-928-5318
Email: kgohr@dts-doc.com
www.dts-doc.com

**BUSINESS SIZE:** Small Business

**CUSTOMER INFORMATION:**

1a. **TABLE OF AWARDED SPECIAL ITEM NUMBER (SIN)**

<table>
<thead>
<tr>
<th>SIN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>54151S</td>
<td>Information Technology Professional Services</td>
</tr>
<tr>
<td>511210</td>
<td>Software Licenses</td>
</tr>
</tbody>
</table>

1b. **HOURLY RATES:** N/A

2. **MAXIMUM ORDER***:

<table>
<thead>
<tr>
<th>SIN</th>
<th>Amount per order per SIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>54151S</td>
<td>$500,000</td>
</tr>
</tbody>
</table>

*If the best value selection places your order over the Maximum Order identified in this catalog/pricelist, you have an opportunity to obtain a better schedule contract price. Before placing your order, contract the aforementioned contractor for a better price. The contractor may (1) offer a new price for this requirement (2) offer the lowest price available under this contract or (3) decline the order. A delivery order that exceeds the maximum order may be placed under the schedule contract in accordance with FAR 8.404.
3. **MINIMUM ORDER:** $200.00
4. **GEOGRAPHIC COVERAGE:** United States
5. **POINT(S) OF PRODUCTION:** Cuyahoga Falls, OH
6. **DISCOUNT FROM LIST PRICES:** All prices included here-in are NET. Discounts have been deducted.
7. **QUANTITY DISCOUNT(S):** 1% Discount on orders over $250,000 (Services only)
8. **PROMPT PAYMENT TERMS:** Net 30 Days 1% Discount Net 20 Days
9. **FOREIGN ITEMS:** No
10a. **TIME OF DELIVERY:** SIN 54151S: To be determined at the Task Order Level
    SIN 511210: 30 days ARO
10b. **EXPEDITED DELIVERY:** Contact Contractor
10c. **OVERNIGHT AND 2-DAY DELIVERY:** Contact the Contractor
10d. **URGENT REQUIREMENTS:** Agencies can contact the Contractor’s representative for a faster delivery. Customers are encouraged to contact the contractor for the purpose of requesting accelerated delivery.
11. **FOB POINT:** Destination
12a. **ORDERING ADDRESS:** 1729 Portage Trail, Cuyahoga Falls, OH 44223
12b. **ORDERING PROCEDURES:** For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (PBA’s) are found in Federal Acquisition Regulation (FAR) 8.405-3
13. **PAYMENT ADDRESS:** 1729 Portage Trail, Cuyahoga Falls, OH 44223
14. **WARRANTY PROVISION:** Standard Commercial Warranty
15. **EXPORT PACKING CHARGES:** N/A
16. **TERMS AND CONDITIONS OF RENTAL, MAINTENANCE, AND REPAIR (IF APPLICABLE):** N/A
17. **TERMS AND CONDITIONS OF INSTALLATION (IF APPLICABLE):** N/A
18a. **TERMS AND CONDITIONS OF REPAIR PARTS INDICATING DATE OF PARTS PRICE LIST AND ANY DISCOUNTS FROM THE LIST PRICES (IF APPLICABLE):** N/A
18b. **TERMS AND CONDITIONS FOR ANY OTHER SERVICES (IF APPLICABLE):** N/A
19. **LIST OF SERVICE AND DISTRIBUTION POINTS (IF APPLICABLE):** N/A
20. **LIST OF PARTICIPATING DEALERS (IF APPLICABLE):** N/A
21. **PREVENTATIVE MAINTENANCE (IF APPLICABLE):** N/A
22a. **SPECIAL ATTRIBUTES SUCH AS ENVIRONMENTAL ATTRIBUTES (e.g., recycled content, energy efficiency, and/or reduced pollutants):** N/A
SECTION 508 COMPLIANCE FOR EIT: DTS does not offer 508 Compliance products at this time, however if they are offered in the future, those products can be found on our website at www.dts-doc.com.

DUNS NUMBERS: 9 6 3 5 5 1 4 4 5

DOCUMENT TECHNOLOGY SYSTEMS, LTD, is registered in the System for Award Management (SAM) database.

<table>
<thead>
<tr>
<th>EXPERIENCE/EDUCATION SUBSTITUTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Years Experience</td>
</tr>
<tr>
<td>2 Years Experience + AA Degree</td>
</tr>
<tr>
<td>4 Years Experience</td>
</tr>
</tbody>
</table>

Commercial Job Title: Application Engineer I

Minimum/General Experience: Two years of related experience.

Functional Responsibility:
Analyzes functional requirements and configures applications utilizing proprietary platforms and other technologies. Works closely with the Project Manager and/or Business Analyst to interpret functional requirements, effectively configures the application according to requirements, and deliver high quality results. Have knowledge and/or experience programming in various languages which include Java, JavaScript, SQL, Telerik and other web technologies. Knowledge and/or experience in web applications, relational databases, and testing. Has or obtains detailed knowledge and experience with and other TrakRecord software, tools, and methods.

Minimum Education: Bachelor’s Degree or equivalent.

Commercial Job Title: Application Engineer II

Minimum/General Experience: Four years of related experience.

Functional Responsibility:
Senior level resource that analyzes functional requirements and configures applications utilizing proprietary platforms and other technologies. Works closely with the Project Manager and/or Business Analyst to interpret functional requirements, effectively develop the application according to requirements, and deliver high quality results. Has advanced knowledge and/or experience programming in various languages which may include Java, JavaScript, SQL, Telerik and other web technologies. Advanced knowledge and/or experience in web applications, relational databases, and testing. Has advanced and detailed knowledge and experience with TrakRecord software, tools, and methods.

Minimum Education: Bachelor’s Degree or equivalent.

Commercial Job Title: IT Business Analyst I

Minimum/General Experience: Two years of related experience.

Functional Responsibility:
Employs techniques and methodologies such as interviews, document analysis, surveys, site visits, and business process descriptions to analyze and define business and functional requirements. Documents findings in a format that ranges from business analysis, and workflow analysis to be used by the technical team for frameworks and development of solutions. Knowledge and/or experience with web development, which may include Java, JavaScript, SQL, and other web technologies. Solid understanding of how to interpret customer business needs and translate them into application and
operational requirements. Excellent verbal and written communication skills and the ability to interact professionally with a cross functional project team. Has detailed knowledge and experience with TrakRecord software, tools, and implementation methods.

**Minimum Education:** Bachelor’s Degree or equivalent.

### Commercial Job Title: IT Business Analyst II

**Minimum/General Experience:** Four years of relevant experience.

**Functional Responsibility:**
Serves as the communicator between the customer, and the software development team to achieve successful product direction. Drives and challenges project managers and application engineers on how they will successfully execute the project plans and requirements. Employs advanced techniques and methodologies such as interviews, document analysis, site visits, and business process descriptions. Experienced in documenting findings in a format that ranges from use cases, scenarios, business analysis, and workflow analysis to be used by the technical team for frameworks and development of solutions. Advanced knowledge and/or experience with web development, which may include Java, JavaScript, SQL, and other web technologies. Advanced knowledge and/or experience in using requirements definition and management systems and methodologies. Strong analytical skills and advanced knowledge and/or experience with product management. Solid understanding of how to interpret customer business needs and translate them into application and operational requirements. Excellent verbal and written communication skills and the ability to interact professionally with a diverse group of internal and external customers. May assist in preparing schedules and status reports; and/or allocating Business Analyst resources. Has advanced and detailed knowledge and experience TrakRecord software, tools, and methods

**Minimum Education:** Bachelor’s Degree or equivalent.

### Commercial Job Title: IT Project Manager I

**Minimum/General Experience:** Five years of related experience.

**Functional Responsibility:**
Directs and manages one or more small to medium-scale IT projects from beginning to end, following outlined processes and procedures. Defines project scope, goals and deliverables from IT departments that support business goals in collaboration with senior management. Develops project plans and communication documents including developing, submitting, and tracking project milestones, deliverables, project costs, project budget, and invoicing for IT related projects. Develops and delivers progress reports, proposals, invoices, requirements documentation, and presentations. Estimates the resources and participants needed to achieve project goals. Proactively manages changes in IT project scope, identifies potential risks, and develops contingency plans. Has or obtains detailed knowledge and experience with TrakRecord software, tools, and methods

**Minimum Education:** Bachelor’s Degree or equivalent.

### Commercial Job Title: IT Project Manager II

**Minimum/General Experience:** 7 years of related experience.
**Functional Responsibility:**
Senior resource that directs and manages one or more medium to large-scale or complex IT projects from beginning to end, following outlined processes and procedures. Defines project scope, goals and deliverables that support business goals in collaboration with senior IT management. Develops project plans and associated communications documents including developing, submitting, and tracking project milestones, deliverables, project costs, and project budget for IT related projects. Develops and delivers progress reports, proposals, invoices, requirements documentation, and presentations. Develops best practices and tools for IT project execution and management. Estimates the resources and participants needed to achieve project goals. Proactively manages changes in project scope, identifies potential risks, and develops contingency plans. Coaches, mentors, motivates and supervises IT project team members. Has advanced and detailed knowledge and experience with TrakRecord software, tools, and implementation methods.

**Minimum Education:** Bachelor’s Degree or equivalent.

<table>
<thead>
<tr>
<th>Commercial Job Title: IT QA Tester I</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Minimum/General Experience:</strong> Two years of related experience.</td>
</tr>
</tbody>
</table>

**Functional Responsibility:**
Performs a variety of quality control tests on software deliverables to ensure product quality and reliability. Produces test plans and test cases and automates tests where appropriate. Documents testing processes and results. Have knowledge and/or experience with manual testing. Has or obtains detailed knowledge and experience with TrakRecord software, tools, and methods.

**Minimum Education:** Bachelor’s Degree or equivalent.

<table>
<thead>
<tr>
<th>Commercial Job Title: IT QA Tester II</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Minimum/General Experience:</strong> Four years of related experience.</td>
</tr>
</tbody>
</table>

**Functional Responsibility:**
Performs a variety of quality control tests on software deliverables to ensure product quality and reliability. Produces test plans and test cases and automates tests where appropriate. Documents testing processes and results. Has advanced knowledge and/or experience testing applications implemented with technologies such as SQL, web applications, and relational databases. Has advanced knowledge and/or experience with manual testing. Has extensive knowledge and experience with TrakRecord software, tools, and methods. Establishes, tracks and reports Quality Assurance metrics. May lead, and/or mentor Quality Assurance Engineers. May lead team reviews of requirements and other project deliverables. May lead generation and review of test plans and test cases.

**Minimum Education:** Bachelor’s Degree or equivalent.

| Commercial Job Title: IT Security Specialist |
### Commercial Job Title: Database Analyst I

**Minimum/General Experience:** Two years of related experience.

**Functional Responsibility:**
Evaluates, designs, and manages existing or proposed relational databases for solutions built upon TrakRecord software products. Identifies, acquires and structures data of the user department to support requirements. Analyzes database requirements of the user department, applications programming and operations. Reviews database utilization and performs basic tuning to ensure optimal performance. Submits recommendations for solutions that require definition of the physical structure and functional capabilities of databases and require data security and data backup/recovery specifications. Proposes detailed specifications and coordinates installation of revised or new systems. Serves as staff and technical resource on database design, modifications and or upgrades. Experience with SQL Server database administration. Knowledge and/or experience writing SQL including query optimization, views, stored procedures and functions. Knowledge or experience with SQL Server SQL Profiler and performance monitoring tools. Has or obtains detailed knowledge and experience with TrakRecord software, tools, and methods.

**Minimum Education:** Bachelor’s Degree or equivalent.

### Commercial Job Title: Database Analyst II

**Minimum/General Experience:** Four years of related experience.

**Functional Responsibility:**
Evaluates, designs, and manages existing or proposed relational databases for solutions built upon TrakRecord software products. Identifies, acquires and structures data of the user department to support requirements. Analyzes database requirements of the user department, applications programming and operations. Reviews database utilization and performs basic tuning to ensure optimal performance. Submits recommendations for solutions that require definition of the physical
structure and functional capabilities of databases and require data security and data backup/recovery specifications. Proposes detailed specifications and coordinates installation of revised or new systems. Serves as staff and technical resource on database design, modifications and upgrades. Experience with SQL Server and Oracle database administration, including all phases of administration such as backup and recovery, Memory structures, performance monitoring and tuning and physical architecture. Advanced knowledge and/or experience writing SQL query optimization, views, stored procedures and functions. Advanced knowledge and/or experience with SQL Server database, SQL Server Profiler, mirroring and log shipping, performance monitoring tools. Advanced knowledge and/or experience with SQL Developer, and SQL Server Management Studio clients. Advanced knowledge and/or experience with Visual Studio tool. May also lead and/or mentor database analysts. Has advanced and detailed knowledge and experience with TrakRecord software, tools, and methods.

**Minimum Education:** Bachelor’s Degree or equivalent.

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**Commercial Job Title:** IT Subject Matter Expert

**Minimum/General Experience:** Eight years of related experience.

**Functional Responsibility:**
Responsible for providing expert knowledge within a technical field; developing application concepts; conveying information to a programming technical team; and monitoring application development. Expert in multiple technical disciplines. Responsible for assessing functional uses of the application, identifying risks, and developing documentation. Provides expert guidance and insight into specific technologies and their applications, and independently performs a variety of system design and integration tasks where specific subject matter and technical expertise is necessary. Plans and performs research, design assessment, development, integration and other assignments in a specific technical area. Supervises broad team of engineers. Is responsible for highly complex technical/engineering areas, and may perform other duties as assigned.

**Minimum Education:** Bachelor’s Degree or equivalent.

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**Commercial Job Title:** IT Technical Writer

**Minimum/General Experience:** Four years of related experience.

**Functional Responsibility:**
Drafts, updates and/or edits technical documents for professional services projects. Writes and edits various documentations which may include user manuals, programmer guides, administration guides, technical training materials, business requirements, functional requirements, technical specifications, test plans and test cases, business process definitions, and related technical materials. Acquires subject knowledge by interviewing subject matter experts, by observing and using software applications, and through the incorporation of technical content from a variety of sources. Advanced knowledge and/or experience communicating technical specifications and instructions clearly and effectively to a wide range of audiences. Has advanced and detailed knowledge and experience with TrakRecord software.

**Minimum Education:** Bachelor’s Degree or equivalent.
The Service Contract Labor Standards (SCLS), formerly the Service Contract Act (SCA), apply to this contract and it includes SCLS applicable labor categories. Labor categories and fixed price services marked with a (**) in this pricelist are based on the U.S. Department of Labor Wage Determination Number(s) identified in the SCLS/SCA matrix. The prices awarded are in line with the geographic scope of the contract (i.e., nationwide).

### SCLS/SCA Matrix

<table>
<thead>
<tr>
<th>SCLS/SCA Eligible Labor Category</th>
<th>SCLS/SCA Equivalent Code Title</th>
<th>Wage Determination No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Writer</td>
<td>30462 – Technical Writer II</td>
<td>2015-4731</td>
</tr>
</tbody>
</table>
SOFTWARE LICENSE AGREEMENT

This Software License Agreement ("Agreement") is made and effective as of the date set forth in the Purchase Order by and between Document Technology Systems, Ltd., an Ohio Limited Liability Company ("DTS") and the Ordering Activity under GSA Schedule contracts identified in the Purchase Order ("Licensee").

DTS has developed and licenses to users its software program marketed under the name TrakRecord (the "Software").

NOW, THEREFORE, in consideration of the mutual promises set forth herein, DTS and Licensee agree as follows:

1. License.
   DTS hereby grants to Licensee a perpetual, non-exclusive, limited license to use the Software, as set forth in Exhibit A, in the United States of America as set forth in this Agreement.

2. Restrictions.
   Licensee shall not modify, copy, duplicate, reproduce, license or sublicense the Software, or transfer or convey the Software or any right in the Software to anyone else without the prior written consent of DTS; provided that Licensee may make one copy of the Software for backup or archival purposes.

3. Warranty of Title.
   DTS hereby represents and warrants to Licensee that DTS is the owner of the Software or otherwise has the right to grant to Licensee the rights set forth in this Agreement. In the event of any breach or threatened breach of the foregoing representation and warranty, Licensee’s sole remedy shall be to require DTS or to either: i) procure, at DTS’s expense, the right to use the Software, ii) replace the Software or any part thereof that is in breach and replace it with Software of comparable functionality that does not cause any breach, or iii) refund to Licensee the full amount of the license fee upon the return of the Software and all copies thereof to DTS.

4. Warranty of Functionality.
   A. For a period of sixty (60) days following delivery of the Software to Licensee (the "Warranty Period"), DTS warrants that the Software shall perform in all material respects according to the DTS’s specifications concerning the Software when used with the appropriate computer equipment. In the event of any breach or alleged breach of this warranty, Licensee shall promptly notify DTS and return the Software to DTS at Licensor’s expense. Licensee’s sole remedy shall be to require DTS to correct the Software so that it operates according to the warranty. This warranty shall not apply to the Software if modified by anyone or if used improperly or on an operating environment not approved by DTS.

   B. In the event of any defect in the media upon which the Software is provided arising within thirty (30) days of the date of delivery of the Software, upon return to DTS of the Software upon the original media, DTS shall provide Licensee a new copy of the Software.

5. Software Support.
   Will be provided at the fee specified in the applicable GSA Schedule Pricelist. Software support includes bug fixes, updates, enhancements and improvement performance to the software product.

   DTS’S WARRANTIES SET FORTH IN THIS AGREEMENT ARE EXCLUSIVE AND ARE IN LIEU OF ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.

7. Limitation of Liability.
   DTS shall not be responsible for, and shall not pay, any amount of incidental, consequential or other indirect damages, whether based on lost revenue or otherwise, regardless of whether DTS was advised of the possibility of such losses in advance. In no event shall DTS’s liability hereunder exceed the amount of license
fees paid by Licensee, regardless of whether Licensee’s claim is based on contract, tort, strict liability, product liability or otherwise. The foregoing limitation of liability shall not apply to (1) personal injury or death resulting from Licensor’s negligence, (2) for fraud; or (3) for any other matter for which liability cannot be excluded by law.

SUBJECT TO THIS CLAUSE UNDER NO CIRCUMSTANCES WILL DTS OR ITS RELATED PERSONS BE LIABLE FOR ANY CONSEQUENTIAL, INDIRECT, SPECIAL, PUNITIVE, OR INCIDENTAL DAMAGES, WHETHER FORESEEABLE OR UNFORESEEABLE, BASED ON CLAIMS OF CUSTOMER OR ITS CUSTOMERS (INCLUDING, BUT NOT LIMITED TO, CLAIMS FOR LOSS OF DATA, GOODWILL, PROFITS, USE OF MONEY OR USE OF THE SOFTWARE, INTERRUPTION IN USE OR AVAILABILITY OF DATA, STOPPAGE OF OTHER WORK OR IMPAIRMENT OF OTHER ASSETS), ARISING OUT OF BREACH OF EXPRESS OR IMPLIED WARRANTY, BREACH OF CONTRACT, MISREPRESENTATION, STRICT LIABILITY IN TORT OR OTHERWISE, EXCEPT ONLY IN THE CASE OF PERSONAL INJURY OR DEATH WHERE AND TO THE EXTENT THAT APPLICABLE LAW PROHIBITS EXCLUSION OF SUCH LIABILITY. IN NO EVENT WILL THE AGGREGATE LIABILITY WHICH DTS AND ITS RELATED PERSONS MAY INCUR IN ANY ACTION OR PROCEEDING ARISING OUT OF PERFORMANCE OR NON-PERFORMANCE OF THIS AGREEMENT EXCEED THE TOTAL AMOUNT ACTUALLY PAID TO DTS BY CUSTOMER FOR THE SPECIFIC PRODUCT OR SERVICE THAT DIRECTLY CAUSED THE DAMAGE.

8. Notice.
Any notice given in accordance with this Clause shall be deemed to be received by and served upon the other party on the date such letter would in the ordinary course of post have reached such address or on the date such notice is served or left at the relevant address (as appropriate) and in the case of facsimile shall be deemed to have been served on the day following the date of successful transmission.

Any notice required by this Agreement or given in connection with it, shall be in writing and shall be given to the appropriate party by personal delivery or by certified mail, postage prepaid, or recognized overnight delivery services.

This Agreement shall be governed and construed in accordance with the Federal laws of the United States.

10. Assignment
The Customer may not assign this Agreement to a third party without the prior written agreement of DTS which agreement may be withheld in its complete discretion and without assigning any reason therefore.

11. Force Majeure
Excusable delays shall be governed by FAR 552.212-4(f).

12. Reserved

13. Entire Agreement
This Agreement and the Cover Page and any variations subsequently made to the terms of this Agreement as provided herein, constitute the entire agreement between the parties in respect of the subject matter hereof and supersedes all proposals or prior agreements, whether oral or written, and all other communications between the parties relating to the subject matter of this Agreement.

If any term of this Agreement is held by a court of competent jurisdiction to be invalid or unenforceable, then this Agreement, including all of the remaining terms, will remain in full force and effect as if such invalid or unenforceable term had never been included.

15. Headings.
Headings used in this Agreement are provided for convenience only and shall not be used to construe meaning or intent.
**Right-to-Copy Pricing:** Licensee shall have no other right to copy, in whole or in part, the Licensed Software. Any copy of the Licensed Software made by Licensee shall be the exclusive property of Document Technology Systems.

**Term License Cessation:** Condition does not apply at this time, as TrakRecord is offered as a Perpetual Site License.

**Utilization Limitations for Perpetual Licenses**

Software Asset Identification Tags (SWID) (Option 1 Perpetual License) is not applicable at this time.

Reallocation of Perpetual Software (Option 2 Perpetual License)

1.) The purpose of SIN 511210 OPTION 2 is to allow ordering activities to transfer software assets for a pre-negotiated charge to other ordering activities.

2.) When an ordering activity becomes aware that a reusable software asset may be available for transfer, it shall contact the Contractor, identify the software license or licenses in question, and request that these licenses be reallocated or otherwise made available to the new ordering activity.

3.) Contractors shall release the original ordering activity from all future obligations under the original license agreement and shall present the new ordering activity with an equivalent license agreement. When the new ordering activity agrees to the license terms, henceforth any subsequent infringement or breach of licensing obligations by the new ordering activity shall be a matter exclusively between the new ordering activity and the Contractor.

4.) The original ordering activity shall de-install, and/or make unusable all of the software assets that are to be transferred. It shall have no continuing right to use the software and any usage shall be considered a breach of the Contractor's intellectual property and a matter of dispute between the original ordering activity/original license grantee and the licensor.

5.) As a matter of convenience, once the original licenses are deactivated, di-installed, or made otherwise unusable by the original ordering activity or license grantee, the Contractor may elect to issue new licenses to the new ordering activity to replace the old licenses. When new licenses are not issued, the Contractor shall provide technical advice on how best to achieve the functional transfer of the software assets.

6.) Software assets that are eligible for transfer that have lapsed Software Maintenance Services (SIN 54151) may require a maintenance reinstatement fee, chargeable to the new ordering activity or license grantee. When such a fee is paid, the new ordering activity shall receive all the rights and benefits of Software Maintenance Services.

7.) When software assets are eligible for transfer, and are fully covered under pre-paid Software Maintenance Services (SIN 54151), the new ordering activity shall not be required to pay maintenance for those license assets prior to the natural termination of the paid for maintenance period. The rights associated with paid for current Software Maintenance Services shall automatically transfer with the software licenses without fee. When the maintenance period expires, the new ordering activity or license grantee shall have the option to renew maintenance.

8.) The administrative fee to support the transfer of licenses, exclusive of any new incremental licensing or maintenance costs shall be 20 percentage (%) of the original license fee. The fee shall be paid only at the time of transfer. In applying the transfer fee, the Software Contractor shall provide transactional data that supports the original costs of the licenses.

**Software Conversions:** Full monetary credit will be allowed to the ordering activity when conversion from one version of the software to another is made as a result of a change in operating system, or from one computer system to another. Under a perpetual license, the purchase price of the new software shall be reduced by the amount that was paid to purchase the earlier version.
Under a term license, if conversion credits had accrued while the earlier version was under a term license, those credits shall carry forward and remain available as conversion credits which may be applied towards the perpetual license price of the new version.

Infrastructure Guidelines

- TrakRecord software will operate with the SQL Server Standard Edition
- Virtual environments are preferred for all servers
- TrakRecord can be configured with a less powerful outward facing web server by having public access traffic redirected to the internal Application Server. This depends upon County preferences concerning firewall configurations.

<table>
<thead>
<tr>
<th>Database Server</th>
<th>Web Server (optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>MS Windows Server 2016 (or newer)</td>
<td>MS Windows Server 2016 (or newer)</td>
</tr>
<tr>
<td>MS SQL Server 2014 (or newer)</td>
<td>16GB Memory</td>
</tr>
<tr>
<td>16GB Memory</td>
<td>2 processors</td>
</tr>
<tr>
<td>2 processors</td>
<td></td>
</tr>
</tbody>
</table>

**Application/Image Server**

- MS Windows Server 2016 (or newer)
- 16GB Memory (depends upon whether a separate web server is utilized)
- 2 Processors
- 2TB Disk Storage is recommended for historical data/images

<table>
<thead>
<tr>
<th>Workstations and Peripherals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 10 OS</td>
</tr>
<tr>
<td>6GB Memory for standard workstation, 8GB for Scanning workstation</td>
</tr>
<tr>
<td>Dual Vertical Monitors (suggested for indexing work)</td>
</tr>
<tr>
<td>Cash Drawer (We have integrated with MS Cash Drawer model CF405)</td>
</tr>
<tr>
<td>Zebra model GC420d Label Printer</td>
</tr>
<tr>
<td>Document Scanner (TWAIN compatible)</td>
</tr>
<tr>
<td>Canon CR-50 Check Scanner/Endorser (option to capture check images)</td>
</tr>
<tr>
<td>Windows compatible printers</td>
</tr>
</tbody>
</table>

**TrakRecord Software**

TrakRecord is a records management software. Modules included in the perpetual site license:
- Cashiering Module - record customer, index data and financial information.
- Scanning Module – scan the recorded document in for repository retrieval.
- Data Entry/Quality Assurance Module – index document data for search and retrieval.
- Reports – audit, financial, index, performance metrics reporting.
- System Administration – system setup and management administration.
- PAX – public access tool for search and retrieval of recorded documents.