HONORABLE TERRI ROSS
UPSHUR COUNTY CLERK

OVERAGE FROM INDEXING OF REAL PROPERTY RECORDS

APRIL 13, 2018

FILED
TERRI ROSS
COUNTY CLERK
2018 APR 30 AM 10: 17
UPSHUR COUNTY, TX.
BY _____
DEPUTY

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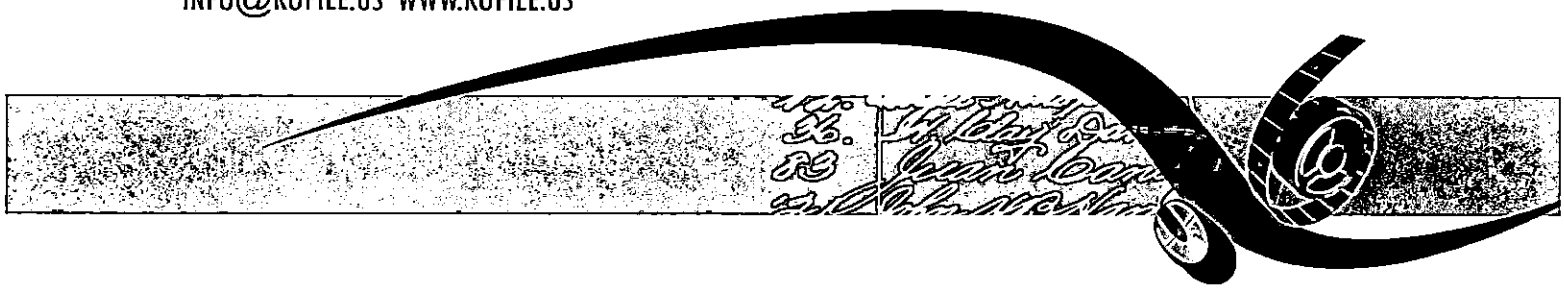

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KOFILE TECHNOLOGIES

I. EXECUTIVE SUMMARY

This quote addresses overages from the project addressing 343 volumes of Upshur County Clerk's Deed Records. The projected budget addressed all aspects of the project less the indexing of 70 volumes of Deed Records. The estimated document counts were approximately 30% over the estimated counts.

Kofile Technologies, Inc. (hereby Kofile) is uniquely qualified to complete the Upshur County's modernization goals. Kofile has taken an innovative approach to this project to ensure a successful outcome. The project pricing is itemized to distinguish between manuscript, typescript, and negative Photostat.

Kofile's experience with the data conversion of public records is inferior to none. Kofile's basis for success is decades of experience, realistic solutions, and professional analysis. Many projects involve re-imaging what low-bid vendors have already imaged. Kofile invests in the best hardware and software. Technicians are trained to handle fragile documents. With Kofile, images are the highest quality and are free of distortion and loss of information due to capture.

DO IT ONCE,
DO IT RIGHT,
DO IT FOREVER

This philosophy places Kofile above other competitors. Services are not *'as-is'* or *'scan it and forget it.'* Kofile guarantees that work is the highest quality and free of distortion or loss due to capture. Kofile will provide consistently keyed index fields to improve retrieval. Upshur County is assured of the following key differentiators with Kofile's indexing services:

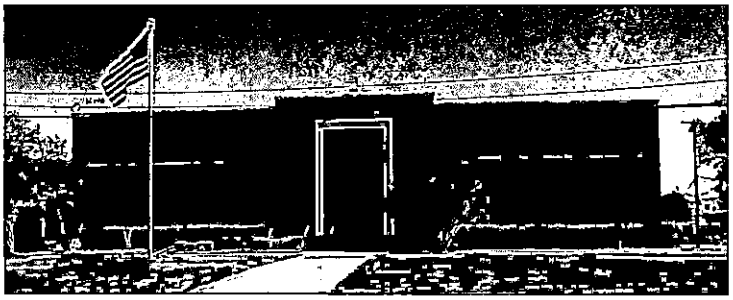
- *Kofile **blind re-keys each field** to maintain a 99.25% accuracy rate.*
- *Our employees are key assets—our Data Entry Manager has 43 years of experience.*
- *Kofile indexes at our Dallas facility, ensuring data confidentiality and security.*
- *Kofile does not use third-parties—minimizing errors and threats to data integrity.*

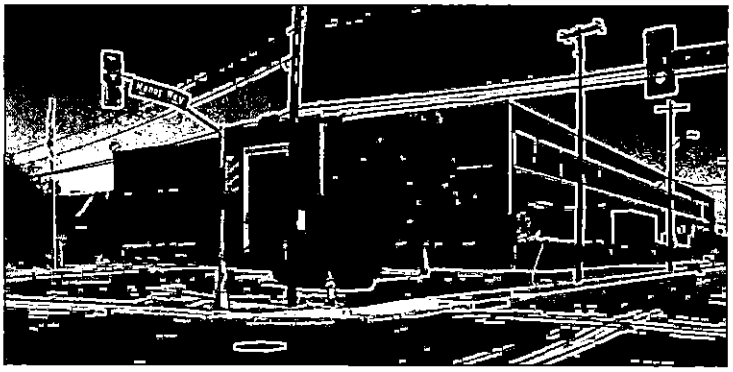
Kofile understands the need for access to public records and ease of rapid, digital retrieval. This proposal addresses the ability of the Kofile solution to meet the Upshur County Clerk's requirements. With headquarters located in Dallas, Tex., Kofile can work side-by-side with the County Clerk. With Kofile, Upshur County saves money, eliminate exposure of assets at multiple locations, and ensure a resulting digital image that is the highest quality and free of distortion or information loss. Kofile appreciates this opportunity to be of service to the Upshur County Clerk in this engagement.

II. PROJECT EXECUTION

LOCATION OF WORK

The location of work is Kofile's corporate headquarters is located at 6300 Cedar Springs Road in Dallas, Tex., *see right*. Kofile possesses a history of responsibility, and it has invested in a facility with superior security to mitigate loss and destruction before it occurs.





Upshur County is welcome to inspect any Kofile facility—with or without notice.

Our entire facility is contained within a fire-resistant brick and concrete building with structural steel support members, and fire-rated walls, ceiling, and flooring.
The Kofile facility is F5 Tornado Resistant according to an architectural assessment preformed by Tanner Consulting, January 2010.

Due to the sensitive nature of the data, Kofile provides multiple security measures. Kofile combines a 24/7 manned on-site security person with electronic surveillance. A state-of-the-art security system protects the entire building. In addition to the Motion Detector Security System, Kofile follows rigorous end-of-day closing and lock-down inspection protocol.

Regulated Facility Environment

Kofile has 24-hour temperature and Relative Humidity (RH) controls. All work areas for original Documents meet the archival climate control standards as supported by the Texas State Library and Archives Commission. Kofile has four independent HVAC systems with programmable thermostats. Each vault has a separate and independent HVAC system. The HVAC for the work and storage areas are constantly set at 70°F. The level of relative humidity (RH) is maintained at a percentage in the mid-fifties.

The laboratories are windowless and centrally located to eliminate exposure to ultraviolet (UV) light. Kofile does not have any issues with pest control. The building is regularly maintained. Food and drinks are not permitted in the conservation areas by anyone, for any reason. Records being treated for mold or pests are quarantined in standard polyethylene bags, separate from other records, until remedial treatment is complete.

SYSTEM SECURITY

Kofile works in a secured, directory-based environment. Kofile employees are subjected to background checks and extensive interviews. Before they work with confidential records, technicians must graduate a series of work-effort tiers. Operator terminals are configured to ensure that no data can leave the facility. Any employee who works on a project is

issued a username and password to access images. Rights are assigned to individual images as "read only." Only approved employees have the passwords to change image permissions. Therefore, no one can delete or modify images without authorization. All activity of this nature is logged.

Kofile establishes positive control over each item. Inventory control is continuously maintained throughout each step. Our SQL imaging database maintains a complete audit trail throughout each step. We have managed numerous projects and have not lost any media or source files. Irreplaceable roll film, aperture cards, cartridges, paper files, charts, maps, and microfiche are all handled in this manner, without loss.

Kofile's server architectures allow redundancy of data operations in multiple locations. Data is regularly backed up to allow services to resume without interruption. Scanned information is captured on local workstations and processed in batches. After capture, batches are stored on centralized servers. Index servers are also backed up. After indexing, data is batch processed on central servers. These are backed up nightly, and the entire group of information is stored on archive servers. These data sets are moved to tape with multiple copies maintained offsite and within the vault noted above. A backup implementation and rotation schedule is provided upon request.

PRODUCTION TRACKING SYSTEM (PTS)

An integral part of project management relates to the cataloguing of incoming files and tracking. Kofile uses its Production Tracking System (PTS) capability to produce unique IDs for each control unit. PTS provides staff with the tools necessary to positively control the project and to manage the inventory of images, boxes, and microfilm on an ongoing basis. Kofile employees are able to track the individual status of each document traveling through our system and is used for audit tracking purposes for each employee.

TURNAROUND

The turnaround time for this project will be a mutual agreement between Kofile and Upshur County.

INFORMATION REQUESTS

"Hot Shots" or Upshur County information requests are available via fax or email. Upon receipt of a Hot Shot, Kofile will flag the requested record and verify inventory control, pull supporting paperwork, and email/fax a response to the requester or alternate. The turnaround time for Hot Shots will meet or exceed the requirements of the County Clerk.

III. PROJECT METHODOLOGY

Our experience with the data conversion of archival documents is inferior to none. We can address any concerns regarding the conservation treatment and handling of fragile items, superior image capture and microfilming, and quality of work— ***all at one facility***.

ARCHIVAL INDEXING

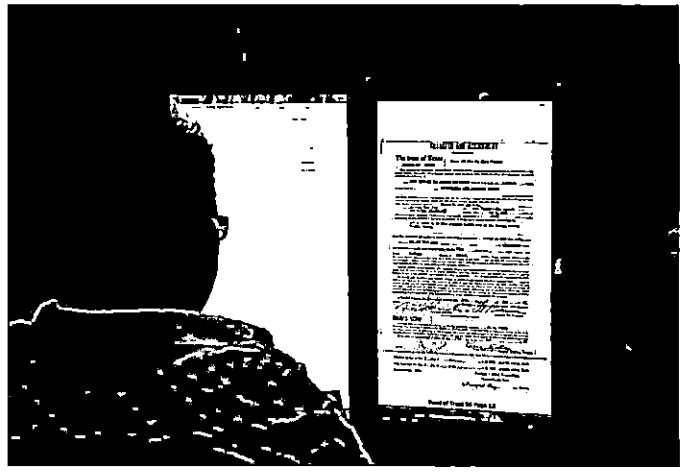
Our proprietary indexing software and keying procedures provides proven 99.25% accuracy. Prior to beginning any indexing project, Kofile conducts a comprehensive assessment of the indexing specifications of the County Clerk's Office.

The assessment process includes documenting established methods of indexing specific instruments, clarifying terminology, and determining the standards used for entering names, dates, and other basic information required for indexing. This analysis produces essential information to ensure the metadata's accuracy and integrity.

Full consideration is given to all indexing situations, including:

- *cross-indexed documents*
- *differentiation between individual names & corporation names*
- *government departments & agencies*
- *alternate & alias names*
- *abbreviations, titles, & naming consistency (e.g., hyphens, nos., spaces, & suffixes)*

Taking additional time for a thorough examination of the County's particular requirements allows for accurate and consistent indexes, guaranteeing quick searches for users.



DATA ENTRY PROCEDURES

Data integrity is essential. Kofile's goal is to provide consistently keyed fields. This will improve document retrieval and build a dependable, searchable database for Upshur County's staff and patrons.

Kofile performs key entry at least twice for every field. Following the initial field key entry, the record displays to a second technician. This individual also keys the field (also termed a "blind re-key"). The software compares the entries. If they do not match, the record is sent to a supervisor.

This supervisor identifies the problem with the field entry and determines if it is a one-time keying error or a prevailing issue. The supervisor decides if a new keying standard is needed. The record is then sent to another technician and keyed again. **With this methodology, each field is blind-keyed three times.**

In Kofile's quality control procedures (QC), managers and supervisors internally research and answer questions about any problematic process. If the Upshur County Clerk's Office

is required to provide input, Kofile will contact the County Clerk for a clarification and/or decision. Client involvement demonstrates our pride in building successful professional relationships with our clients.

REAL PROPERTY DATA ENTRY FIELDS

For this project, Kofile has identified the following required fields. Any amendments will be communicated to the County Clerk with an exception list for the County to match and scan the amendment and the record themselves.

- ◊ Instrument Number/Document Number
- ◊ Document Date
- ◊ File Date
- ◊ Document Type
- ◊ Book, Volume, and Page
- ◊ Volume/Page Reference Number
- ◊ Document Reference Number
- ◊ Grantor
- ◊ Grantee
- ◊ Brief Property Description

Exceptions are expected, as not all records contain a registrar number (Deaths) or a certificate number (Marriages). Kofile will establish rules for these abnormalities once the project commences.

IV. PROPOSAL PRICING

This quote addresses overages from the project addressing 343 volumes of Upshur County Clerk's Deed Records. The projected budget addressed all aspects of the project less the indexing of 70 volumes of Deed Records. The estimated document counts were approximately 30% over the estimated counts.

OVERAGE OF INDEXING OF REAL PROPERTY RECORDS PROJECT OVERVIEW						
RECORD SERIES	VOLUME	FORMAT	LEVEL OF SERVICE	DESCRIPTION	DOCUMENT COUNT	PRICE QUOTE
Deed Record	A/B-V, 16, 19-21, 23, 25-69	Typescript or Manuscript	(ID) Archival Indexing ▪ Create a pipe-delimited index file. ▪ Key and blind re-key verify documents. ▪ Real Property Indexing Fields, when applicable as identified herein.	ESTIMATE	20,359	$62,154.88
				REVISED ESTIMATE*	27,406	$91,381.90

PROPOSAL TOTAL (Amount Exceeding the 5-Year Project Agreement)	$91,381.90

**The revised document counts are based on the actuals from the volumes that already received indexing services (Deed Records Vols. 1-15, 17, 18, 22, 24, 70-319, W, X, Y, Z).*

Without a signed Contract, prices are good for 90 days. Upon approval, unit pricing remains firm for the Contract term. Pricing is based on a Good Faith Estimate of document counts. Billing will occur on actual counts per agreed upon unit pricing.

COUNTY ACCEPTANCE

[signature] COUNTY JUDGE 4/30/18

Signature of County Representative/Title *Date*

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UPSHUR COUNTY, TX.
BY [signature]
DEPUTY

KOFILE TECHNOLOGIES

PROJECT INVENTORY & ITEMIZED PRICING
OVERAGE OF INDEXING OF REAL PROPERTY RECORDS

RECORD SERIES TITLE	VOLUME	DOCUMENT COUNT		FORMAT		ESTIMATED PRICE QUOTE		ADJUSTED PRICE QUOTE	
		ESTIMATE	REVISION	ESTIMATE	REVISION	UNIT PRICE	TOTAL	UNIT PRICE	TOTAL
Deed Record	A/B [A; B]	269	91; 239	Typescript		*$2.74*	$737.06	*$2.74*	$249.34; $654.86
Deed Record	C	182	313	Typescript	Manuscript	*$2.74*	$498.68	*$4.4061*	$1,379.11
Deed Record	D	245	421	Typescript	Manuscript	*$2.74*	$671.30	*$4.4061*	$1,854.97
Deed Record	E	363	626	Typescript	Manuscript	*$2.74*	$994.62	*$4.4061*	$2,758.22
Deed Record	F	218	374	Typescript	Manuscript	*$2.74*	$597.32	*$4.4061*	$1,647.88
Deed Record	G	291	498	Typescript	Manuscript	*$2.74*	$797.34	*$4.4061*	$2,194.24
Deed Record	H	219	498	Typescript	Manuscript	*$2.74*	$600.06	*$4.4061*	$2,194.24
Deed Record	I & J	355	601	Typescript	Manuscript	*$2.74*	$972.70	*$4.4061*	$2,648.07
Deed Record	K	282	483	Typescript	Manuscript	*$2.74*	$772.68	*$4.4061*	$2,128.15
Deed Record	L	290	497	Typescript	Manuscript	*$2.74*	$794.60	*$4.4061*	$2,189.83
Deed Record	M	255	436	Manuscript & Typescript	Manuscript	*$4.4061*	$1,123.56	*$4.4061*	$1,921.06
Deed Record	N	291	499	Typescript	Manuscript	*$2.74*	$797.34	*$4.4061*	$2,198.64
Deed Record	O	362	628	Typescript	Manuscript	*$2.74*	$991.88	*$4.4061*	$2,767.03
Deed Record	P	368	620	Manuscript & Typescript	Manuscript	*$4.4061*	$1,621.44	*$4.4061*	$2,731.78
Deed Record	Q	364	622	Typescript	Manuscript	*$2.74*	$997.36	*$4.4061*	$2,740.59
Deed Record	R	291	499	Manuscript		*$4.4061*	$1,282.18	*$4.4061*	$2,198.64
Deed Record	S	291	458	Manuscript		*$4.4061*	$1,282.18	*$4.4061*	$2,017.99
Deed Record	T	291	498	Manuscript		*$4.4061*	$1,282.18	*$4.4061*	$2,194.24
Deed Record	U	291	498	Manuscript		*$4.4061*	$1,282.18	*$4.4061*	$2,194.24
Deed Record	V	291	500	Manuscript		*$4.4061*	$1,282.18	*$4.4061*	$2,203.05
Deed Record	16	291	352	Manuscript	Typescript	*$4.4061*	$1,282.18	*$2.74*	$964.48
Deed Record	19	291	354	Manuscript	Typescript	*$4.4061*	$1,282.18	*$2.74*	$969.96
Deed Record	20	291	208	Manuscript		*$4.4061*	$1,282.18	*$4.4061*	$916.47
Deed Record	21	291	353	Manuscript	Typescript	*$4.4061*	$1,282.18	*$2.74*	$967.22
Deed Record	23	291	353	Manuscript	Typescript	*$4.4061*	$1,282.18	*$2.74*	$967.22
Deed Record	25	291	357	Manuscript	Typescript	*$4.4061*	$1,282.18	*$2.74*	$978.18
Deed Record	26	291	354	Typescript		*$2.74*	$797.34	*$2.74*	$969.96
Deed Record	27	291	351	Typescript		*$2.74*	$797.34	*$2.74*	$961.74
Deed Record	28	291	355	Typescript		*$2.74*	$797.34	*$2.74*	$972.70

PROJECT INVENTORY & ITEMIZED PRICING
OVERAGE OF INDEXING OF REAL PROPERTY RECORDS

RECORD SERIES TITLE	VOLUME	DOCUMENT COUNT		FORMAT		ESTIMATED PRICE QUOTE		ADJUSTED PRICE QUOTE	
		ESTIMATE	REVISION	ESTIMATE	REVISION	UNIT PRICE	TOTAL	UNIT PRICE	TOTAL
Deed Record	29	291	357	Typescript		*$2.74*	$797.34	*$2.74*	$978.18
Deed Record	30	291	355	Typescript		*$2.74*	$797.34	*$2.74*	$972.70
Deed Record	31	291	355	Typescript		*$2.74*	$797.34	*$2.74*	$972.70
Deed Record	32	291	357	Typescript		*$2.74*	$797.34	*$2.74*	$978.18
Deed Record	33	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	34	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	35	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	36	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	37	291	358	Typescript		*$2.74*	$797.34	*$2.74*	$980.92
Deed Record	38	291	351	Typescript		*$2.74*	$797.34	*$2.74*	$961.74
Deed Record	39	291	350	Typescript		*$2.74*	$797.34	*$2.74*	$959.00
Deed Record	40	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	41	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	42	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	43	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	44	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	45	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	46	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	47	291	354	Typescript		*$2.74*	$797.34	*$2.74*	$969.96
Deed Record	48	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	49	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	50	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	51	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	52	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	53	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	54	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	55	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	56	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	57	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	58	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	59	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	60	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22

PROJECT INVENTORY & ITEMIZED PRICING OVERAGE OF INDEXING OF REAL PROPERTY RECORDS									
		DOCUMENT COUNT		FORMAT		ESTIMATED PRICE QUOTE		ADJUSTED PRICE QUOTE	
RECORD SERIES TITLE	VOLUME	ESTIMATE	REVISION	ESTIMATE	REVISION	UNIT PRICE	TOTAL	UNIT PRICE	TOTAL
Deed Record	61	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	62	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	63	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48
Deed Record	64	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	65	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	66	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	67	291	354	Typescript		*$2.74*	$797.34	*$2.74*	$969.96
Deed Record	68	291	353	Typescript		*$2.74*	$797.34	*$2.74*	$967.22
Deed Record	69	291	352	Typescript		*$2.74*	$797.34	*$2.74*	$964.48

V. KEY PERSONNEL

Kofile's projects are managed by true pioneers in micrographics, imaging, re-creation, and data entry solutions for government records. Our projects often continue in multiple phases over many years and administrations. With the combination of an experienced imaging team and technology competence, and considering our status as a software developer, our capability to enhance the image processing process extends well beyond that of competitors.

MANDY WIGGINS

Wiggins manages the relationship between the imaging and indexing production groups. She has been at the forefront of software operation and implementation for over nine years serving as an expert in document imaging and troubleshooting database issues. Wiggins's has spent most of her career coordinating business objectives with client expectations. Her technical background and proficiency in customer service provide county clients and their customers with a unique, client -focused approach to enhancing the ease of using government records.

JANICE CASEY

Casey oversees key and verifying locates and GFs from the Map Room. She is also responsible for key and the verification of legal documents for Title Customers. Casey creates and updates the data entry process and procedures manual. She directly communicates issues and suggestions to the Indexing Manager. She is available to answer questions concerning document interpretation. She also oversees the transfer of new documents from Daily Indexing to Internal Systems, and releases new indexes to Daily Indexing from Internal Systems.

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