



3717 Apalachee Parkway Suite 201
Tallahassee, Florida 32311
(800) 342-2633
www.MCCinnovations.com

Purchasing Department
Region 14 Education Service Center
National Cooperative Purchasing Alliance
P.O. Box 701273
Houston, Texas 77270

To Whom it May Concern,

The future is clear. We want to make a difference in your team's lives. Our vision is to free one million people from manual business processes so they can grow, and their organizations can prosper. Today, you are taking steps to be part of this vision.

While reviewing our proposal, keep in mind MCCi is your partner in the digital transformation journey.

Digital Transformation: As we embark on your digital transformation journey, MCCi is your partner, not just another vendor. We do the right thing, always. We care deeply about serving our clients and maintaining a solid reputation for always doing what's right – even when it's not easy. We know that the work we do has a big impact on our clients' lives and are committed to doing that work with the highest integrity and character level. We are committed to building a solution to grow in your organization, further streamline processes, and eliminate bottlenecks.

Full Portfolio of Solutions: As an IT services company with expertise in delivering end-to-end solutions, we provide our clients some of the leading hyper-automation technologies, including Laserfiche for content services, Blue Prism for robotic process automation, ABBYY for intelligent capture, and One Span for digital signatures.

Industry Experts: MCCi has the most committed, intelligent, and innovative professionals in the industry. We are a team ready to create next-level results with the courage to try something new. Without focusing on our clients, we will not reach our destination. With 150 years of combined professional services experience, your assigned project manager is committed to your implementation success.

Thank you for your interest in MCCi's solutions, we are pleased to enclose our proposal.

Sincerely,

Stephanie Wood
Director of Sales Operations
Corporate Office
(800) 342-2633 ext. 1739 | swood@mccinnovations.com

Request for Proposal #36-22 for Documents and Records Management

National Cooperative Purchasing Alliance (NCPA)

Issued: November 14, 2022

Valid for 120 days



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TAB 1

MASTER AGREEMENT - GENERAL TERMS AND CONDITIONS

Customer Support

The vendor shall provide timely and accurate technical advice and sales support. The vendor shall respond to such requests within one (1) working day after receipt of the request.

Disclosures

Respondent affirms that he/she has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor or service to a public servant in connection with this contract.

The respondent affirms that, to the best of his/her knowledge, the offer has been arrived at independently, and is submitted without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give an unfair advantage over other vendors in the award of this contract.

Renewal of Contract

Unless otherwise stated, all contracts are for a period of three (3) years with an option to renew for up to two (2) additional one-year terms or any combination of time equally not more than 2 years if agreed to by Region 14 ESC and the vendor.

Funding Out Clause

Any/all contracts exceeding one (1) year shall include a standard "funding out" clause. A contract for the acquisition, including lease, of real or personal property is a commitment of the entity's current revenue only, provided the contract contains either or both of the following provisions:

Retains to the entity the continuing right to terminate the contract at the expiration of each budget period during the term of the contract and is conditioned on a best efforts attempt by the entity to obtain appropriate funds for payment of the contract.

Shipments (if applicable)

The awarded vendor shall ship ordered products within seven (7) working days for goods available and within four (4) to six (6) weeks for specialty items after the receipt of the order unless modified. If a product cannot be shipped within that time, the awarded vendor shall notify the entity placing the order as to why the product has not shipped and shall provide an estimated shipping date. At this point the participating entity may cancel the order if estimated shipping time is not acceptable.

Tax Exempt Status

Since this is a national contract, knowing the tax laws in each state is the sole responsibility of the vendor.

Payments

The entity using the contract will make payments directly to the awarded vendor or their affiliates (distributors/business partners/resellers) as long as written request and approval by NCPA is provided to the awarded vendor.

Adding Authorized Distributors/Dealers

Awarded vendors may submit a list of distributors/partners/resellers to sell under their contract throughout the life of the contract. Vendor must receive written approval from NCPA before such distributors/partners/resellers considered authorized.

Purchase orders and payment can only be made to awarded vendor or distributors/ business partners/resellers previously approved by NCPA.

Pricing provided to members by added distributors or dealers must also be less than or equal to the pricing offered by the awarded contract holder.

All distributors/partners/resellers are required to abide by the Terms and Conditions of the vendor's agreement with NCPA.

Pricing

All pricing submitted shall include the administrative fee to be remitted to NCPA by the awarded vendor. It is the awarded vendor's responsibility to keep all pricing up to date and on file with NCPA.

All deliveries shall be freight prepaid, F.O.B. destination and shall be included in all pricing offered unless otherwise clearly stated in writing

Warranty

Proposal should address the following warranty information:

- Applicable warranty and/or guarantees of equipment and installations including any conditions and response time for repair and/or replacement of any components during the warranty period.
- Availability of replacement parts
- Life expectancy of equipment under normal use
- Detailed information as to proposed return policy on all equipment

Products: Vendor shall provide equipment, materials and products that are new unless otherwise specified, of good quality and free of defects

Construction: Vendor shall perform services in a good and workmanlike manner and in accordance with industry standards for the service provided.

Safety

Vendors performing services shall comply with occupational safety and health rules and regulations. Also all vendors and subcontractors shall be held responsible for the safety of their employees and any conditions that may cause injury or damage to persons or property.

Permits

Since this is a national contract, knowing the permit laws in each state is the sole responsibility of the vendor.

Indemnity

The awarded vendor shall protect, indemnify, and hold harmless Region 14 ESC and its participants, administrators, employees and agents against all claims, damages, losses and expenses arising out of or resulting from the actions of the vendor, vendor employees or vendor subcontractors in the preparation of the solicitation and the later execution of the contract.

Franchise Tax

The respondent hereby certifies that he/she is not currently delinquent in the payment of any franchise taxes.

Supplemental Agreements

The entity participating in this contract and awarded vendor may enter into a separate supplemental agreement to further define the level of service requirements over and above the minimum defined in this contract i.e. invoice requirements, ordering requirements, specialized delivery, etc. Any supplemental agreement developed as a result of this contract is exclusively between the participating entity and awarded vendor.

Certificates of Insurance

Certificates of insurance shall be delivered to the Public Agency prior to commencement of work. The insurance company shall be licensed in the applicable state in which work is being conducted. The awarded vendor shall give the participating entity a minimum of ten (10) days notice prior to any modifications or cancellation of policies. The awarded vendor shall require all subcontractors performing any work to maintain coverage as specified.

Legal Obligations

It is the Respondent's responsibility to be aware of and comply with all local, state, and federal laws governing the sale of products/services identified in this RFP and any awarded contract and shall comply with all while fulfilling the RFP. Applicable laws and regulation must be followed even if not specifically identified herein.

Protest

A protest of an award or proposed award must be filed in writing within ten (10) days from the date of the official award notification and must be received by 5:00 pm CST. Protests shall be filed with Region 14 ESC and shall include the following:

- Name, address and telephone number of protester
- Original signature of protester or its representative
- Identification of the solicitation by RFP number
- Detailed statement of legal and factual grounds including copies of relevant documents and the form of relief requested

Any protest review and action shall be considered final with no further formalities being considered.

Force Majeure

If by reason of Force Majeure, either party hereto shall be rendered unable wholly or in part to carry out its obligations under this Agreement then such party shall give notice and full particulars of Force Majeure in writing to the other party within a reasonable time after occurrence of the event or cause relied upon, and the obligation of the party giving such notice, so far as it is affected by such Force Majeure, shall be suspended during the continuance of the inability then claimed, except as hereinafter provided, but for no longer period, and such party shall endeavor to remove or overcome such inability with all reasonable dispatch.

The term Force Majeure as employed herein, shall mean acts of God, strikes, lockouts, or other industrial disturbances, act of public enemy, orders and regulation of any kind of government of the United States or any civil or military authority; insurrections; riots; epidemics; pandemic; landslides; lighting; earthquake; fires; hurricanes; storms; floods; washouts; droughts; arrests; restraint of government and people; civil disturbances; explosions, breakage or accidents to machinery, pipelines or canals, or other causes not reasonably within the control of the party claiming such inability. It is understood and agreed that the settlement of strikes and lockouts shall be entirely within the discretion of the party having the difficulty, and that the above requirement that any Force Majeure shall be remedied with all reasonable dispatch shall not require the settlement of strikes and lockouts by acceding to the demands of the opposing party or parties when such settlement is unfavorable in the judgment of the party having the difficulty

Prevailing Wage

It shall be the responsibility of the Vendor to comply, when applicable, with the prevailing wage legislation in effect in the jurisdiction of the purchaser. It shall further be the responsibility of the Vendor to monitor the prevailing wage rates as established by the appropriate department of labor for any increase in rates during the term of this contract and adjust wage rates accordingly.

Termination

Either party may cancel this contract in whole or in part by providing written notice. The cancellation will take effect 30 business days after the other party receives the notice of cancellation. After the 30th business day all work will cease following completion of final purchase order.

Open Records Policy

Because Region 14 ESC is a governmental entity responses submitted are subject to release as public information after contracts are executed. If a vendor believes that its response, or parts of its response, may be exempted from disclosure, the vendor must specify page-by-page and line-by-line the parts of the response, which it believes, are exempt. In addition, the respondent must specify which exception(s) are applicable and provide detailed reasons to substantiate the exception(s).

The determination of whether information is confidential and not subject to disclosure is the duty of the Office of Attorney General (OAG). Region 14 ESC must provide the OAG sufficient

information to render an opinion and therefore, vague and general claims to confidentiality by the respondent are not acceptable. Region 14 ESC must comply with the opinions of the OAG. Region14 ESC assumes no responsibility for asserting legal arguments on behalf of any vendor. Respondent are advised to consult with their legal counsel concerning disclosure issues resulting from this procurement process and to take precautions to safeguard trade secrets and other proprietary information.

PROCESS

Region 14 ESC will evaluate proposals in accordance with, and subject to, the relevant statutes, ordinances, rules, and regulations that govern its procurement practices. NCPA will assist Region 14 ESC in evaluating proposals. Award(s) will be made to the prospective vendor whose response is determined to be the most advantageous to Region 14 ESC, NCPA, and its participating agencies. To qualify for evaluation, response must have been submitted on time, and satisfy all mandatory requirements identified in this document.

Contract Administration

The contract will be administered by Region 14 ESC. The National Program will be administered by NCPA on behalf of Region 14 ESC.

Contract Term

The contract term will be for three (3) year starting from the date of the award. The contract may be renewed for up to two (2) additional one-year terms or any combination of time equally not more than 2 years.

It should be noted that maintenance/service agreements may be issued for up to (5) years under this contract even if the contract only lasts for the initial term of the contract. NCPA will monitor any maintenance agreements for the term of the agreement provided they are signed prior to the termination or expiration of this contract.

Contract Waiver

Any waiver of any provision of this contract shall be in writing and shall be signed by the duly authorized agent of Region 14 ESC. The waiver by either party of any term or condition of this contract shall not be deemed to constitute waiver thereof nor a waiver of any further or additional right that such party may hold under this contract.

Price Increases

Should it become necessary, price increase requests may be submitted at any point during the term of the contract by written amendment. Included with the request must be documentation and/or formal cost justification for these changes. Requests will be formally reviewed, and if justified, the amendment will be approved.

Products and Services Additions

New Products and/or Services may be added to the resulting contract at any time during the term by written amendment, to the extent that those products and/or services are within the scope of this RFP.

Competitive Range

It may be necessary for Region 14 ESC to establish a competitive range. Responses not in the competitive range are unacceptable and do not receive further award consideration.

Deviations and Exceptions

Deviations or exceptions stipulated in response may result in disqualification. It is the intent of Region 14 ESC to award a vendor's complete line of products and/or services, when possible.

Estimated Quantities

While no minimum volume is guaranteed, the estimated (but not limited to) annual volume for Products and Services purchased under the proposed Master Agreement is \$25 million dollars annually. This estimate is based on the anticipated volume of Region 14 ESC and current sales within the NCPA program.

Evaluation

Region 14 ESC will review and evaluate all responses in accordance with, and subject to, the relevant statutes, ordinances, rules and regulations that govern its procurement practices. NCPA will assist the lead agency in evaluating proposals. Recommendations for contract awards will be based on multiple factors, each factor being assigned a point value based on its importance.

Formation of Contract

A response to this solicitation is an offer to contract with Region 14 ESC based upon the terms, conditions, scope of work, and specifications contained in this request. A solicitation does not become a contract until it is accepted by Region 14 ESC. The prospective vendor must submit a signed Signature Form with the response thus, eliminating the need for a formal signing process. Contract award letter issued by Region 14 ESC is the counter-signature document establishing acceptance of the contract.

NCPA Administrative Agreement

The vendor will be required to enter and execute the National Cooperative Purchasing Alliance Administration Agreement with NCPA upon award with Region 14 ESC. The agreement establishes the requirements of the vendor with respect to a nationwide contract effort.

Clarifications/Discussions

Region 14 ESC may request additional information or clarification from any of the respondents after review of the proposals received for the sole purpose of elimination minor irregularities, informalities, or apparent clerical mistakes in the proposal. Clarification does not give respondent an opportunity to revise or modify its proposal, except to the extent that correction of apparent clerical mistakes results in a revision. After the initial receipt of proposals, Region 14 ESC reserves the right to conduct discussions with those respondent's whose proposals are determined to be reasonably susceptible of being selected for award. Discussions occur when oral or written communications between Region 14 ESC and respondent's are conducted for the purpose clarifications involving information essential for determining the acceptability of a proposal or that provides respondent an opportunity to revise or modify its proposal. Region 14 ESC will not assist respondent bring its proposal up to the level of other proposals through discussions. Region 14 ESC will not indicate to respondent a cost or price that it must meet to neither obtain further consideration nor will it provide any information about other respondents' proposals or prices.

Multiple Awards

Multiple Contracts may be awarded as a result of the solicitation. Multiple Awards will ensure that any ensuing contracts fulfill current and future requirements of the diverse and large number of participating public agencies.

Past Performance

Past performance is relevant information regarding a vendor's actions under previously awarded contracts; including the administrative aspects of performance; the vendor's history of reasonable and cooperative behavior and commitment to customer satisfaction; and generally, the vendor's businesslike concern for the interests of the customer.

EVALUATION CRITERIA

Pricing (40 points)

Electronic Price Lists

- Products, Services, Warranties, etc. price list
- Prices listed will be used to establish both the extent of a vendor's product lines, services, warranties, etc. available from a particular bidder and the pricing per item.

Ability to Provide and Perform the Required Services for the Contract (25 points)

- Product Delivery within participating entities specified parameters
- Number of line items delivered complete within the normal delivery time as a percentage of line items ordered.
- Vendor's ability to perform towards above requirements and desired specifications.
- Past Cooperative Program Performance
- Quantity of line items available that are commonly purchased by the entity.
- Quality of line items available compared to normal participating entity standards.

References and Experience (20 points)

- A minimum of ten (10) customer references for product and/or services of similar scope dating within past 3 years
- Respondent Reputation in marketplace
- Past Experience working with public sector.
- Exhibited understanding of cooperative purchasing

Value Added Products/Services Description, (8 points)

- Additional Products/Services related to the scope of RFP
- Marketing and Training
- Minority and Women Business Enterprise (MWBE) and (HUB) Participation
- Customer Service

Technology for Supporting the Program (7 points)

- Electronic on-line catalog, order entry use by and suitability for the entity's needs
- Quality of vendor's on-line resources for NCPA members.
- Specifications and features offered by respondent's products and/or services

SIGNATURE FORM

The undersigned hereby proposes and agrees to furnish goods and/or services in strict compliance with the terms, specifications and conditions at the prices proposed within response unless noted in writing. The undersigned further certifies that he/she is an officer of the company and has authority to negotiate and bind the company named below and has not prepared this bid in collusion with any other Respondent and that the contents of this proposal as to prices, terms or conditions of said bid have not been communicated by the undersigned nor by any employee or agent to any person engaged in this type of business prior to the official opening of this proposal.

Prices are guaranteed: **120 days**

MCCi, LLC.

Company Name

3717 Apalachee Parkway, Suite 201

Address

Tallahassee

FL

32311

City

State

Zip

(850)701-0725

Telephone Number

(850)564-7496

Fax Number

salesoperations@mccinnovations.com

Email Address

Donny Barstow

Printed Name

President & CEO

Position

E-SIGNED by Donny Barstow
on 2022-10-27 11:59:02 GMT

Authorized Signature

TAB 2 NCPA ADMINISTRATION AGREEMENT

This Administration Agreement is made as of December 8, 2022, by and between National Cooperative Purchasing Alliance (“NCPA”) and MCCI, LLC (“Vendor”).

Recitals

WHEREAS, Region 14 ESC has entered into a certain Master Agreement dated December 8, 2022, referenced as Contract Number 01-162, by and between Region 14 ESC and Vendor, as may be amended from time to time in accordance with the terms thereof (the “Master Agreement”), for the purchase of Document and Records Management;

WHEREAS, said Master Agreement provides that any state, city, special district, local government, school district, private K-12 school, technical or vocational school, higher education institution, other government agency or nonprofit organization (hereinafter referred to as “public agency” or collectively, “public agencies”) may purchase products and services at the prices indicated in the Master Agreement;

WHEREAS, NCPA has the administrative and legal capacity to administer purchases under the Master Agreement to public agencies;

WHEREAS, NCPA serves as the administrative agent for Region 14 ESC in connection with other master agreements offered by NCPA

WHEREAS, Region 14 ESC desires NCPA to proceed with administration of the Master Agreement;

WHEREAS, NCPA and Vendor desire to enter into this Agreement to make available the Master Agreement to public agencies on a national basis;

NOW, THEREFORE, in consideration of the payments to be made hereunder and the mutual covenants contained in this Agreement, NCPA and Vendor hereby agree as follows:

General Terms and Conditions

- The Master Agreement, attached hereto as Exhibit 1 and incorporated herein by reference as though fully set forth herein, and the terms and conditions contained therein shall apply to this Administration Agreement except as expressly changed or modified by this Administration Agreement.
- NCPA shall be afforded all of the rights, privileges and indemnifications afforded to Region 14 ESC under the Master Agreement, and such rights, privileges and indemnifications shall accrue and apply with equal effect to NCPA under this Administration Agreement including, but not limited to, Contractor’s obligation to provide appropriate insurance and certain indemnifications to Region 14 ESC.

- Contractor shall perform all duties, responsibilities and obligations required under the Master Agreement in the time and manner specified by the Master Agreement.
- NCPA shall perform all of its duties, responsibilities, and obligations as administrator of purchases under the Master Agreement as set forth herein, and Contractor acknowledges that NCPA shall act in the capacity of administrator of purchases under the Master Agreement.
- With respect to any purchases made by Region 14 ESC or any Participating Agency pursuant to the Master Agreement, NCPA (a) shall not be construed as a dealer, re-marketer, representative, partner, or agent of any type of Contractor, Region 14 ESC, or such Participating Agency, (b) shall not be obligated, liable or responsible (i) for any orders made by Region 14 ESC, any Participating Agency or any employee of Region 14 ESC or Participating Agency under the Master Agreement, or (ii) for any payments required to be made with respect to such order, and (c) shall not be obligated, liable or responsible for any failure by the Participating Agency to (i) comply with procedures or requirements of applicable law, or (ii) obtain the due authorization and approval necessary to purchase under the Master Agreement. NCPA makes no representations or guaranties with respect to any minimum purchases required to be made by Region 14 ESC, any Participating Agency, or any employee of Region 14 ESC or Participating Agency under this Administration Agreement or the Master Agreement.
- With respect to any supplemental agreement entered into between a Participating Agency and Contractor pursuant to the Master Agreement, NCPA, its agents, members and employees shall not be made party to any claim for breach of such agreement.
- This Administration Agreement supersedes any and all other agreements, either oral or in writing, between the parties hereto with respect to the subject matter hereof, and no other agreement, statement, or promise relating to the subject matter of this Administrative Agreement which is not contained herein shall be valid or binding.
- Contractor agrees to allow NCPA to use their name and logo within website, marketing materials and advertisement. Any use of NCPA name and logo or any form of publicity regarding this Administration Agreement or the Master Agreement by Contractor must have prior approval from NCPA.
- If any action at law or in equity is brought to enforce or interpret the provisions of this Administration Agreement or to recover any administrative fee and accrued interest, the prevailing party shall be entitled to reasonable attorney's fees and costs in addition to any other relief to which such party may be entitled.
- Neither this Administration Agreement nor any rights or obligations hereunder shall be assignable by Contractor without prior written consent of NCPA, provided, however, that the Contractor may, without such written consent, assign this Administration Agreement and its rights and delegate its obligations hereunder in connection with the transfer or sale of all or substantially all of its assets or business related to this Administration Agreement, or in the event of its merger, consolidation, change in control or similar transaction. Any permitted assignee shall assume all assigned obligations of its assignor under this Administration Agreement.
- This Administration Agreement and NCPA's rights and obligations hereunder may be assigned at NCPA's sole discretion, to an existing or newly established legal entity that has the authority and capacity to perform NCPA's obligations hereunder.

Term of Agreement

This Agreement shall be in effect so long as the Master Agreement remains in effect, provided, however, that the obligation to pay all amounts owed by Vendor to NCPA through the

termination of this Agreement and all indemnifications afforded by Vendor to NCPA shall survive the term of this Agreement.

Fees and Reporting

The awarded vendor shall electronically provide NCPA with a detailed quarterly report showing the dollar volume of all sales under the contract for the previous quarter. Reports are due on the fifteenth (15th) day after the close of the previous quarter. It is the responsibility of the awarded vendor to collect and compile all sales under the contract from participating members and submit one (1) report. The report shall include at least the following information as listed in the example below:

Entity Name	Zip Code	State	PO or Job #	Sale Amount

Total _____

Each quarter NCPA will invoice the vendor based on the total of sale amount(s) reported. From the invoice the vendor shall pay to NCPA an administrative fee based upon the tiered fee schedule below. Vendor’s annual sales shall be measured on a calendar year basis. Deadline for term of payment will be included in the invoice NCPA provides.

Annual Sales Through Contract	Administrative Fee
0 - \$30,000,000	2%
\$30,000,001 - \$50,000,000	1.5%
\$50,000,001+	1%

Supplier shall maintain an accounting of all purchases made by Public Agencies under the Master Agreement. NCPA and Region 14 ESC reserve the right to audit the accounting for a period of four (4) years from the date NCPA receives the accounting. In the event of such an audit, the requested materials shall be provided at the location designated by Region 14 ESC or NCPA. In the event such audit reveals an under reporting of Contract Sales and a resulting underpayment of administrative fees, Vendor shall promptly pay NCPA the amount of such underpayment, together with interest on such amount and shall be obligated to reimburse NCPA’s costs and expenses for such audit.

ACKNOWLEDGMENT OF CONTRACTOR REQUIREMENTS

National Cooperative Purchasing Alliance

Organization

MCCI, LLC

Vendor Name

Matthew Mackel

Name

Donald Barstow

Name

Director, Business Development

Title

President and CEO

Title

PO Box 701273

Address

3717 Apalachee Parkway, Suite 201

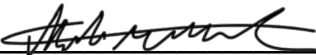
Address

Houston, TX 77270

Address

Tallahassee, Florida 32311

Address



Signature

E-SIGNED by Donny Barstow
on 2022-10-24 17:59:09 GMT

Signature

December 8, 2022

Date

October 24, 2022

Date

TAB 3 VENDOR QUESTIONNAIRE

Please provide responses to the following questions that address your company's operations, organization, structure, and processes for providing products and services.

Locations Covered

- Bidder must indicate any and all locations where products and services can be offered.
- Please indicate the price co-efficient for each location if it varies.

<input checked="" type="checkbox"/> All 50 States & District of Columbia (Selecting this box is equal to checking all boxes below)			
<input type="checkbox"/> Alabama	<input type="checkbox"/> Illinois	<input type="checkbox"/> Montana	<input type="checkbox"/> Rhode Island
<input type="checkbox"/> Alaska	<input type="checkbox"/> Indiana	<input type="checkbox"/> Nebraska	<input type="checkbox"/> South Carolina
<input type="checkbox"/> Arizona	<input type="checkbox"/> Iowa	<input type="checkbox"/> Nevada	<input type="checkbox"/> South Dakota
<input type="checkbox"/> Arkansas	<input type="checkbox"/> Kansas	<input type="checkbox"/> New Hampshire	<input type="checkbox"/> Tennessee
<input type="checkbox"/> California	<input type="checkbox"/> Massachusetts	<input type="checkbox"/> New Jersey	<input type="checkbox"/> Texas
<input type="checkbox"/> Colorado	<input type="checkbox"/> Michigan	<input type="checkbox"/> New Mexico	<input type="checkbox"/> Utah
<input type="checkbox"/> Connecticut	<input type="checkbox"/> Minnesota	<input type="checkbox"/> New York	<input type="checkbox"/> Vermont
<input type="checkbox"/> Delaware	<input type="checkbox"/> Mississippi	<input type="checkbox"/> North Carolina	<input type="checkbox"/> Virginia
<input type="checkbox"/> D.C.	<input type="checkbox"/> Missouri	<input type="checkbox"/> North Dakota	<input type="checkbox"/> Washington
<input type="checkbox"/> Florida	<input type="checkbox"/> Kentucky	<input type="checkbox"/> Ohio	<input type="checkbox"/> West Virginia
<input type="checkbox"/> Georgia	<input type="checkbox"/> Louisiana	<input type="checkbox"/> Oklahoma	<input type="checkbox"/> Wisconsin
<input type="checkbox"/> Hawaii	<input type="checkbox"/> Maine	<input type="checkbox"/> Oregon	<input type="checkbox"/> Wyoming
<input type="checkbox"/> Idaho	<input type="checkbox"/> Maryland	<input type="checkbox"/> Pennsylvania	

<input type="checkbox"/> All U.S. Territories and Outlying Areas (Selecting this box is equal to checking all boxes below)	
<input type="checkbox"/> American Samoa	<input type="checkbox"/> Northern Mariana Island
<input type="checkbox"/> Federated States of Micronesia	<input type="checkbox"/> Puerto Rico
<input type="checkbox"/> Guam	<input type="checkbox"/> U.S. Virgin Islands
<input type="checkbox"/> Midway Islands	

<input checked="" type="checkbox"/> All Canada Provinces and Territories All Orders will be placed in US Dollars (Selecting this box is equal to checking all boxes below)	
<input type="checkbox"/> Alberta	<input type="checkbox"/> Prince Edward Island
<input type="checkbox"/> British Columbia	<input type="checkbox"/> Quebec
<input type="checkbox"/> Manitoba	<input type="checkbox"/> Saskatchewan
<input type="checkbox"/> New Brunswick	<input type="checkbox"/> Northwest Territories
<input type="checkbox"/> Newfoundland and Labrador	<input type="checkbox"/> Nunavut
<input type="checkbox"/> Nova Scotia	<input type="checkbox"/> Yukon
<input type="checkbox"/> Ontario	

If awarded a Master Agreement, will your company extend the terms offered in your Proposal to public agencies in Canada? If no or maybe, please explain.

Yes Maybe No

All Orders will be placed in US Dollars

If awarded a Master Agreement, will your company extend the terms offered in your Proposal to private sector customers?

Yes Maybe No

Minority and Women Business Enterprise (MWBE) and (HUB) Participation

It is the policy of some entities participating in NCPA to involve minority and women business enterprises (MWBE) and historically underutilized businesses (HUB) in the purchase of goods and services. Respondents shall indicate below whether or not they are an M/WBE or HUB certified.

Minority/Women Business Enterprise Respondent Certifies that this firm a Minority / Women Business Enterprise Historically Underutilized Business Respondent Certifies that this firm is a Historically Underutilized Business

Small Business, MWBE and HUB Growth

If Proposer is a Large, National or Multinational Organization/Corporation, what programs are in place that partners or supports the growth of small and MWEB and HUB business? If yes, please describe.

N/A, we are a recognized small, MWEB or HUB organization
 No, we do not have any programs in place.
 Yes, we have programs in place.

Residency

Responding Company's principal place of business is in the city of Tallahassee, State of Florida.

Felony Conviction Notice

Please Check Applicable Box (If the 3rd box is checked, a detailed explanation of the names and convictions must be attached):

- A publicly held corporation; therefore, this reporting requirement is not applicable.
- Is not owned or operated by anyone who has been convicted of a felony.
- Is owned or operated by the following individual(s) who has/have been convicted of a felony

Distribution Channel

Which best describes your company's position in the distribution channel:

- Manufacturer Direct Certified education/government reseller
- Authorized Distributor Manufacturer marketing through reseller
- Value-added reseller Other: _____

Processing Contact Information

Contact Person Stephanie Wood

Title Director of Sales Operations

Company MCCi, LLC

Address 3717 Apalachee Parkway, Suite 201

City/State/Zip Tallahassee, FL 32311

Phone (850) 701-0725

Email swood@mccinnovations.com

Pricing Information

In addition to the current typical unit pricing furnished herein, the Vendor agrees to offer all future product introductions at prices that are proportionate to Contract Pricing. If answer is no, attach a statement detailing how pricing for NCPA participants would be calculated for future product introductions.

- Yes No

Pricing submitted includes the required NCPA administrative fee. The NCPA fee is calculated based on the invoice price to the customer.

Yes No

TAB 4 - VENDOR PROFILE

COMPANY'S OFFICIAL REGISTERED NAME.

MCCi, LLC.

BRIEF HISTORY OF YOUR COMPANY, INCLUDING THE YEAR IT WAS ESTABLISHED.

In 2003, MCCi was founded as a company primarily focused on helping public sector organizations with records management and document digitization. We quickly achieved our goal to be the largest Laserfiche solution provider and, in the process, helping our clients go paperless. As technology and our clients' needs changed, we became more involved in their business processes and operations. Over the past decade, we have gone through our own digital transformation journey. We've evolved into a consulting company with expertise in business process automation and we provide our clients with leading hyper-automation technologies. We are a trusted partner to approximately 1,000 public sector organizations as an end-to-end services provider who fiercely believes that strong partnerships and people lead to successful outcomes.

MCCi is headquartered in Tallahassee, Florida but has a virtual-first workforce with approximately 130 employees spread across the nation. Our team is composed of some of the most committed, intelligent, and innovative industry professionals. MCCi prides itself as a high-growth, high-touch workplace that attracts great talent and focuses on their core values. This growth mindset is deeply embedded, starting with the hiring and onboarding stage, and continuing throughout each person's career development. As an expert in emerging technologies, we have a disciplined practice of continuous training as demonstrated by our team's many industry certifications. Our focus on leadership (philosophy and practice) is intense, deliberate, and believed to be a core differentiator as a company.

Our growth and the success of our clients are widely recognized. Most recently, *Inc. Magazine* recognized MCCi as one of their "Inc. 5000" fastest-growing private companies in the United States. Additional noteworthy recognition includes such accolades as: Top 10 Best Companies to Work, Florida Companies to Watch, Microsoft Gold Certified Partner, ABBYY Partner of the Year, Blue Prism Public Sector Partner of the Year, and the only Laserfiche Diamond-Level Provider.

COMPANY'S DUN & BRADSTREET (D&B) NUMBER.

557446916

COMPANY'S ORGANIZATIONAL CHART OF THOSE INDIVIDUALS THAT WOULD BE INVOLVED IN THE CONTRACT.

MCCi team members are focused on customer service in every aspect of our clients' projects. We focus on the "Client Lane" as a theme to unite us in how we serve. MCCi brings a dedicated staff of 130 of the most creative and intelligent professionals in the industry. Below is a list of a few individuals that would be involved in the NCPA projects as well as MCCi's Organizational Chart.

Executive Team

MCCi's Executive Team is available for any escalation needed for our clients.

Donny Barstow (President & CEO)

Victor D'Aurio (COO)

Shawn Hermann (CIO)

Jody Bennett (SVP of Sales & Marketing)

Emery Jones (CFO)

Account Team

MCCi's Account Team will serve as the main points of contact throughout the contract for sales, customer service, pre-sales, and various other needs the client may have outside of professional services or technical

support. These individuals are listed in the section below as Account Executives, Solutions Architects, Territory Managers and Account Managers.

Professional Services Team

The Professional Services team members will be available as a contact for professional services. Several Professional Services Team are listed below in the state offices section as Program Managers, Project Managers, Project Coordinators, System Engineers, and Technical Trainers.

Technical Support Team

MCCi has a technical support team of over sixteen support experts led by Drew Ferrell (MCCi Support Manager). Almost 10 years ago, Drew joined our support team as a technician. He has seen it all serving our diverse client base over his impressive tenure. A 99% client satisfaction rating speaks to the organization he has built.

Sales Operations & Finance

MCCi Sales Operations & Finance teams handle sales quotes, invoicing, renewals, billing inquiries, etc. These teams are led by Stephanie Wood (Director of Sales Operations) and Emery Jones (CFO). These teams are ready and able to answer questions when needed.



CORPORATE OFFICE LOCATION.

MCCi's Corporate office is located at 3717 Apalachee Parkway, Suite 201, Tallahassee FL 32311

LIST THE NUMBER OF SALES AND SERVICES OFFICES FOR STATES BEING BID IN SOLICITATION. LIST THE NAMES OF KEY CONTACTS AT EACH WITH TITLE, ADDRESS, PHONE AND E-MAIL ADDRESS.

Florida Home Office

Donny Barstow ~ President & Chief Executive Officer
Victor D'Aurio ~ Chief Operating Officer
Shawn Hermann ~ Chief Information Officer
Lawrence Steed ~ Territory Manager
Gabe Young - Solutions Architect
Jack Frazee ~ Senior Account Manager
Alexandra Barnes ~ Account Manager
Austin Morris ~ Account Manager
Kyle Law ~ Account Manager
Jenice Owens ~ Account Manager
Desiree Johnson ~ Project Manager
Dana Terry ~ Project Manager
Keith Hay ~ Lead Technical Engineer
Mahmoud Abdelhadi ~ Systems Engineer I
Paula Gomez ~ Project Coordinator II
Paul Heavener ~ Technical Trainer

California Office

Emery Jones ~ Chief Financial Officer
Rose Brewer ~ Solutions Architect
Menfis Clark ~ Account Manager
Paul Pastor ~ Systems Engineer I
Alex Wilson ~ Systems Engineer III

Colorado Office

Justin Mandeville ~ Account Manager
Arianna Kessler ~ Project Coordinator
Lauren Keddington ~ Systems Engineer I
Veronica Lopez ~ Technical Trainer

Florida Offices

Traci Small ~ Vice President of Enterprise Sales
Alexis Blue ~ Enterprise Account Manager
Bryan Frick ~ Account Executive
Michael Lunn ~ Lead Technical Engineer
Seth Gordon ~ Project Coordinator

Georgia Office

Michael Beaudreau ~ Account Executive
Taylor E Hutchinson ~ Territory Manager

Idaho Office

Sahara Peterson ~ Account Manager
Jeremy Wheeler ~ Systems Engineer I
Bryant Biorn ~ Systems Engineer III

Mississippi Office

Jody Bennett ~ Senior Vice President of Sales & Marketing

New Hampshire Office

Michael Collier ~ Account Manager

New Jersey Office

Jessica Steiner ~ Project Coordinator

North Carolina Office

Garrick Tomlin ~ Client Consulting Program Manager
Kevin Smith ~ Account Executive
Nathan Whicker ~ Lead Solutions Architect
David Maddox ~ Senior Solutions Architect
Katie Hennigan ~ Project Manager
Molly McCarthy ~ Systems Engineer II
Jeffrey L Neelley ~ Systems Engineer III

South Carolina Office

Kimberly Ratliff ~ Project Coordinator
James Rutherford ~ Systems Engineer I

Texas Office

Jessica Smith ~ Commercial Projects Program Manager
Rigo Ruiz ~ Project Manager
Jason Eades ~ Systems Engineer II
Darrell Rush ~ Systems Engineer II
Levi Johnson ~ Systems Engineer III

Virginia Office

Mike Pazuki - Director of Intelligent Automation
Jeremy Gibson ~ Account Executive
Brian Sabian ~ Senior Solutions Architect
Angela Ellis ~ Solutions Architect
John Geist ~ Project Manager/Systems Engineer
Jeremy Blackwell ~ Project Manager

Washington Office

Andre Armstead ~ Account Executive

Wisconsin Office

Adrienne Hussey ~ Account Manager

Please Note ~ additional contact information will be provided upon request.

DEFINE YOUR STANDARD TERMS OF PAYMENT.

MCCi, utilizes a standard net 30 payment terms policy. Billing terms and milestones are based on specific projects and deliverables.

WHO IS YOUR COMPETITION IN THE MARKETPLACE?

MCCi is a business process automation company that accelerates digital transformation by adding intelligence to clients' processes enterprise-wide. As an IT services company with expertise in delivering end-to-end solutions, we provide our clients some of the leading hyper-automation technologies. MCCi does run into competition with other companies offering similar products and services, but most are lacking the extensive government knowledge that we can provide. Our competition includes other document management companies, other RPA companies, and other intelligent capture companies.

WHAT DIFFERENTIATES YOUR COMPANY FROM COMPETITORS?


MCCi has over 20 years of experience enabling public sector clients to achieve operational efficiencies and meet regulatory commitments with enterprise document/content management technology. This experience shines during our implementations as we have developed a strong set of best practices and take a great deal of pride in every client.. MCCi has been the #1 Laserfiche Solution Provider in the public sector since 2005 and the #1 Laserfiche Solution Provider in the world for the last 10 years. After implementation, we provide world-class support and on-going project services. Our client satisfaction rating is 99% because we put our clients first. Our support team is comprised of Laserfiche-certified, friendly professionals available 24/7/365. We have the largest Laserfiche services team in the country, which enables us to properly staff our clients' projects with the right experts for their needs.

MCCi Differentiator: Experience in Deployment

- **Largest Laserfiche Provider** – We have implemented over 1300 Laserfiche systems successfully and support over 115,000 users. We do not underbid; we over deliver. We ensure client satisfaction on every project. We currently have over thirty-five state agencies as happy clients. We understand the complexities and intricacies of state agencies.
- **Public Sector Focus** – MCCi provides services to approximately 1,000 public sector agencies including School Districts, Cities, Counties, State Agencies, Special Districts, Higher Education, and more. MCCi also understands the critical compliance requirements of records management in the public sector and has in-depth knowledge of deploying and configuring the Records Management Module in the Laserfiche.

- **Professional Certifications** – MCCi’s staff is well-trained and holds multiple certifications in security, HIPPA, CJIS, project management, records management, CDIA+ and more to give clients the peace of mind that they’re in the most competent hands. Our staff is also either Laserfiche Gold or Platinum Certified. MCCi also has certifications in UiPath and Blue Prism for additional robotic process automation needs.
- **Specialization in Enterprise Adoption**- Our goal is to maximize client ROI for Laserfiche. We future-proof initial project plans, knowing that one day Laserfiche will be used across the client’s entire organization. This mindset helps clients plan to meet their short-term objectives while architecting the solution to align with long-term priorities and reduce maintenance burden. Our professional services team has technical trainers that provide best-in-class, hands-on training to ensure enterprise-wide adoption. Our project managers know the product. They are Laserfiche Gold Certified and hold other professional certifications. They get to know client business processes and help clients implement a plan that considers their needs and the technology’s capabilities.
- **Development and Migration Skills** – We have a highly skilled development team with over 80 years’ combined experience. We have over 20 years’ experience migrating documents and data from legacy ECM solutions. Our team is available for performing data migrations, custom integrations, and other customizations. While Laserfiche is a no-code/lowcode solution, this team can further extend the platform to maximize value for clients’ organizations.
- **Dedicated Support** – Once a client’s implementation is complete, they will have access to our top-rated support staff for troubleshooting & supporting their Laserfiche system. Our staff can be easily reached through email, phone, or our online support center. We have supplementary support packages that scale based on client needs to ensure they have the necessary assistance and knowledge available. MCCi’s client focus is validated by our 98% renewal rating on Laserfiche support and a client satisfaction score of 99%(updated on a weekly basis). MCCi’s multi-layered support team provides multiple contacts to ensure fast response times and maximize product performance. Our support team has over 50 years of Laserfiche experience with nine technicians and nine analysts. Our help desk is monitored by live experts ready to troubleshoot problems and over 90% of all calls are answered live. YTD our team has fielded 2226 calls.
- **Digitization Services** – MCCi provides document scanning services as well as microfiche and microfilm conversions so agencies can digitize old content, reduce or eliminate costly storage, and ensure proper backup of critical records in Laserfiche.
- **Training Services** – Before, during, and after a client’s project, we focus on ensuring the users are trained on the software and stay up to date on the features available. In addition to our personalized training offered during implementation, we offer a yearly subscription to our proprietary Online Training Center for Laserfiche to help protect the client’s Laserfiche investment. This allows all types of users, regardless of their role, to access on-demand videos on popular topics. This information is updated monthly and will be a continued resource for the organization. We also host and maintain our own fully featured online support center to ensure our clients gain direct access to training manuals, “how to” checklists, feature-rich training videos, a vast knowledge base, software updates/release notes, and a special section entitled “Real World Scenarios” that provides best practices and client use-cases to help pave the way to enterprise adoption.
- **MCCi Events** – MCCi conducts webinars, user groups, tech days, and other thought leadership events for continued education for our clients.

DESCRIBE HOW YOUR COMPANY WILL MARKET THIS CONTRACT IF AWARDED.

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MCCi's Marketing Department executes a marketing plan (outlined below) for all MCCi products and services. We will use these same strategies and tactics for marketing the NCPA contract.

Vertical Focus

MCCi has a long history (20+ years) of serving clients in the public sector. Our experience in this market segment has given us a wealth of in-depth experience and expertise, along with many client success stories we are proud to share.

Current public sector verticals we proudly serve include State Agencies, Cities, Counties, Law Enforcement, K-12 School Districts, Special Districts, Courts, and Higher Education.

Tradeshows & Conferences

MCCi attends over 60 conferences each year targeting the above segments. At these events, we have a booth where we provide informational marketing materials and a team of experts ready to discuss attendees' toughest automation challenges. Besides the booth, we actively look to secure speaking engagements to establish thought leadership and educate the market on our products and services. We also sponsor welcome receptions, coffee breaks, or other conference-related items to increase brand awareness.

We have built strong partnerships with the conference organizers/associations. We have other touchpoints with their members throughout the year, so we are building brand awareness and keeping momentum outside of the annual events. For example, they may promote our content or upcoming webinars in their e-newsletters to sponsoring member webinars. Some of our core partnerships include: IIMC (<https://www.iimc.com/>), GMIS (<https://www.gmis.org/>), and TAGITM (<https://www.tagitm.org/>).

Content Marketing

MCCi establishes thought leadership and generates inbound leads through publishing content (white papers, infographics, eBooks, guides) and hosting webinars. We host 1-2 webinars each month and promote these to our database of contacts through marketing automation. We also use marketing automation and lead scoring to promote content based on where our audience is in their buyer's journey. We often will syndicate this content with conference organizers/associations mentioned above and industry publications like GovTech, StateScoop, and The Learning Council.

Examples of a few pieces of content: [The Future of Work in Government](#), [Administrative Secrets to Laserfiche 11](#), [Benefits of Low-Code and No-Code Business Process Automation Platforms](#), [Cabarrus County Extends Laserfiche Capabilities, Wins Awards](#)

Digital Marketing

We generate leads by bidding on keywords that represent what we do and then target those who search for our products and services. If someone is searching for digital transformation consulting services for government agencies, we want MCCi's website to be first in their search results.

We have a presence on social media. We share and promote our thought-leadership content and re-target leads with ads from our sales funnel.

We maintain [our website](#) and engage in search engine optimization to help us rank organically in search results for key terms. As part of our website strategy, we maintain pages dedicated to DIR constituents who would like to learn more about our current contracts:

We partner with digital publications that serve our audience and purchase advertising on their sites and/or e-newsletters. We advertised with GovTech, Learning Counsel, and StateScoop in 2021.

Direct Sales

Our sales organization actively prospects to state and local government. We have both mid-market and enterprise teams that will promote this contract and serve NCPA constituents.

DESCRIBE HOW YOU INTEND TO INTRODUCE NCPA TO YOUR COMPANY.

MCCi is familiar with NCPA and has been working with the organization for several years. Since being awarded the contract with NCPA, we feel we have a close working relationship, and our team will need no introduction.

DESCRIBE YOUR FIRM'S CAPABILITIES AND FUNCTIONALITY OF YOUR ON-LINE CATALOG / ORDERING WEBSITE.

Due to the many solutions MCCi provides, it would be too complex to offer an "online catalog/ordering website," but our recently redesigned website will assist our clients or potential buyers to easily find solutions to fit their needs. On the MCCi website, you will find solutions, insights, company information, events, and support. Contact information is on every page, along with a chat button for quick answers to any questions. In addition to the website, we have a landing page with NCPA that includes all pertinent information and discounts for easy viewing by prospective clients.

DESCRIBE YOUR COMPANY'S CUSTOMER SERVICE DEPARTMENT (HOURS OF OPERATION, NUMBER OF SERVICE CENTERS, ETC.)

MCCI SUPPORT

Clients of MCCi gain a relationship between our staff and their organization to make their product implementation successful and the usage of their product an enjoyable experience. In order to make this possible, MCCi offers both proactive and technical support.

PROACTIVE SUPPORT

Clients will work with their Account Executive and Account Manager in the pre-project phase, and they will continue to support the client throughout their relationship with MCCi. They will assist in pre-implementation processes and be a resource for you for questions and answer and be in touch throughout the year to discuss optimal system usage and ensure client satisfaction.

TECHNICAL SUPPORT

MCCi does provide continued technical support for all MCCi applications. Clients can designate several individuals who are to be the technical support contacts. There is no limit on the number of technical support calls that can be made. Customers may contact MCCi support via the online support center, email (support@mccinnovations.com), or telephone (866-942-0464). Several support reps work to cover extended support hours, in addition, 1-2 reps are on call for 24/7 support clients. Normal/Extended support hours are 8am-8pm EST, 24/7 on call and weekend support is also available. For organizations that require immediate response times and resolution, MCCi offers an add-on Service Level Agreement (SLA). The purpose of this service is to provide priority access and urgent response times for issues.

GREEN INITIATIVES

AS OUR BUSINESS GROWS, WE WANT TO MAKE SURE WE MINIMIZE OUR IMPACT ON THE EARTH'S CLIMATE. WE ARE TAKING EVERY STEP WE CAN TO IMPLEMENT INNOVATIVE AND RESPONSIBLE ENVIRONMENTAL PRACTICES THROUGHOUT NCPA TO REDUCE OUR CARBON FOOTPRINT, REDUCE WASTE, ENERGY CONSERVATION, ENSURE EFFICIENT COMPUTING AND MUCH MORE. TO THAT EFFORT WE ASK RESPONDENTS TO PROVIDE THEIR COMPANIES ENVIRONMENTAL POLICY AND/OR GREEN INITIATIVE.

Going green is not a concept that is new to our society. Most people have been recycling and conscious of the environment for years. The term "going green" has recently taken on a new meaning. It's no longer just about helping the environment; it's about setting a good example as a sustainable company. We at MCCi have set out to be the best example of going green as a completely paperless company. You won't find a filing cabinet or even desks with piles of paper on them anywhere in our office. Going paperless is the foundation of our company and culture. Our goal is to free people from paper processes with electronic records and document management

systems, just as we have done for government agencies nationwide. As our company grows, we continue our efforts in assisting our clients to become paperless and implement processes to eliminate waste. Our mission of providing Digital Transformation will continue to assist our clients to eliminate wasteful processes and engage digital copies and processes rather than the old style of paper copies. MCCi also provide scanning services that assist clients in achieving full digitization of their old files to eliminate the need for massive storage facilities to house documents. Our corporate location utilizes several energy saving measures, such as motion sensor lighting to further our green initiatives.

ANTI-DISCRIMINATION POLICY

It is the policy of MCCi to provide equal employment opportunities without regard to race, color, religion, sex, national origin, age, disability, marital status, veteran status, sexual orientation, genetic information, or any other protected characteristic under applicable law. This policy relates to all phases of employment, including, but not limited to, recruiting, employment, placement, promotion, transfer, demotion, reduction of workforce and termination, rates of pay or other forms of compensation, selection for training, the use of all facilities, and participation in all company-sponsored employee activities. Employees and applicants shall not be subjected to harassment, intimidation or any type of retaliation because they have (1) filed a complaint; (2) assisted or participated in an investigation, compliance review, hearing or any other activity related to the administration of any federal, state or local law requiring equal employment opportunity; (3) opposed any act or practice made unlawful by any federal, state or local law requiring equal opportunity; or (4) exercised any other legal right protected by federal, state or local law requiring equal opportunity. The above-mentioned policies shall be periodically brought to the attention of supervisors and shall be appropriately administered. It is the responsibility of each supervisor of the company to ensure affirmative implementation of these policies to avoid any discrimination in employment. All employees are expected to recognize these policies and cooperate with their implementation. Violation of these policies is a disciplinary offense. MCCi's HR Director has been assigned as the Affirmative Action Officer and will monitor the implementation of our affirmative action program, policy, and plan.

VENDOR CERTIFICATIONS

PROVIDE A COPY OF ALL CURRENT LICENSES, REGISTRATIONS AND CERTIFICATIONS ISSUED BY FEDERAL, STATE AND LOCAL AGENCIES, AND ANY OTHER LICENSES, REGISTRATIONS OR CERTIFICATIONS FROM ANY OTHER GOVERNMENTAL ENTITY WITH JURISDICTION, ALLOWING RESPONDENT TO PERFORM THE COVERED SERVICES INCLUDING, BUT NOT LIMITED TO, LICENSES, REGISTRATIONS, OR CERTIFICATIONS. CERTIFICATIONS CAN INCLUDE M/WBE, HUB, AND MANUFACTURER CERTIFICATIONS FOR SALES AND SERVICE.

From growth as a company to our client's success, at MCCi, LLC. we are achieving great things. Below are just a few recognitions that have been awarded.

- LaserFiche – In 2021 we were awarded Diamond Level Laserfiche Solution Provider for the second year in a row. This award recognizes extraordinary growth achievements and is the highest honor for a Solution Provider. MCCi's going on 19 years as a Laserfiche solution provider for 2022.
- Blue Prism – MCCi received the Regional Public Sector of the Year Partner Excellence Award for 2021!
- Engaging Local Government Leaders (ELGL) Haverford List – MCCi has been recognized as #1 out of the Top 25 companies and organizations serving local government.
- INC. Magazine – MCCi is ranked number 3,660 on its annual Inc. 5000 list for 2021, the most prestigious ranking of the fastest-growing private companies in the United States. This is our fourth year achieving this honor.

MCCi can conduct business in all states. Please see the attached letters from our partners regarding our ability to conduct business nationwide. Any additional documentation can be provided upon request.

October 18, 2022

To Whom It May Concern:

MCCi, LLC is an authorized certified Laserfiche Solution Provider and has been so for over two decades. MCCi, LLC has won many accolades over the years at Laserfiche's annual Winner's Circle for Solution Providers. If you have any questions, please feel free to call or email Associate Director - East, Alex Matos at (562) 676-6367 and alex.matos@laserfiche.com.

Regards,

Wylie Strout

Wylie Strout
General Counsel

TAB 5 - PRODUCTS AND SERVICES

WARRANTY

APPLICABLE WARRANTY AND/OR GUARANTEES OF EQUIPMENT AND INSTALLATIONS INCLUDING ANY CONDITIONS AND RESPONSE TIME FOR REPAIR AND/OR REPLACEMENT OF ANY COMPONENTS DURING THE WARRANTY PERIOD.

Services Warranty

MCCi warrants that all Services shall be performed by personnel with relevant skill sets and familiarity with the solution in a professional and competent manner.

MCCi's provision of a Deliverable to Client shall constitute a representation by MCCi that it has conducted a review of the Deliverable and believes it meets the written specifications, if any, set forth in the corresponding Order. Client shall then have the right to conduct any review of the Deliverable as Client shall deem necessary or desirable. If Client, in its reasonable discretion, determines that any submitted Services or Deliverable does not meet the specifications, set forth in the applicable Order, Client shall have five (5) business days after MCCi's submission to give written notice to MCCi specifying the deficiencies in reasonable detail. MCCi shall use reasonable efforts to promptly cure any such deficiencies. After completing any such cure, MCCi shall resubmit the Deliverable for review as set forth above. Notwithstanding the foregoing, if Client fails to reject any Deliverable within five (5) business days, such Deliverable shall be deemed accepted.

MCCi does not warrant that the services or deliverables will be uninterrupted or error-free, provided that MCCi shall remain obligated pursuant to this section 11. If the services fail to conform to the foregoing warranty in any material respect or to the specification set forth in an order, Client's initial remedy will be for MCCi, at its expense, to promptly use commercially reasonable efforts to cure or correct such failure. Upon failure of the foregoing, Client's remedies, and MCCi's entire liability, as a result of such failure, shall be subject to the limitations set forth in section 12 below. The foregoing warranty is expressly conditioned upon (i) Client providing MCCi with prompt written notice of any claim thereunder prior to the expiration thereof, which notice must identify with particularity the non-conformity; (ii) Client's full cooperation with MCCi in all reasonable respects relating thereto, including, in the case of modified software, assisting MCCi to locate and reproduce the non-conformity; and (iii) with respect to any deliverable, the absence of any alteration or other modification of such deliverable by any person or entity other than MCCi. MCCi also does not warrant any third-party products procured on behalf of Client. If there are any product warranties provided by the manufacturer of the product, any remedy should be requested directly from manufacturer and MCCi has no liability associated therewith.

Except as expressly provided in this section 11, MCCi does not make or give any representation or warranty, whether such representation or warranty be express or implied, including any warranty of merchantability, quality, or fitness for a particular purpose or any representation or warranty from course of dealing or usage of trade.

In the event that Client asserts any claim for warranty services hereunder and such claim relates to any matter that is mutually determined by the Parties not to be MCCi's responsibility hereunder (including any problem with Client's computer hardware or software that was not caused by any Services performed by MCCi), Client shall pay MCCi for all costs incurred for all evaluation, correction or other services performed by MCCi relating to such claim on a time and materials basis at MCCi's then-standard rates.

General Warranty.

MCCi shall perform the Services in compliance with all applicable federal and state laws and regulations and industry codes, including but not limited to (i) federal and state anti-kickback laws and regulations, (ii) federal and state securities laws, meaning that MCCi agrees that Client may be a publicly traded company and MCCi shall

instruct MCCi Personnel that federal and state securities laws prohibit the purchase, sale, or pledge of Client stock while in possession of any material, non-public information, (iii) the Foreign Corrupt Practices Act of 1977, (iv) federal and state privacy and data protection laws, including, but not limited to, Health Insurance Portability and Accountability Act of 1996 and the Health Information Technology for Economic and Clinical Health Act (collectively, "**State Data Protection Laws**"), and (v) MCCi also represents that it uses E-Verify to verify the work authorization of all newly hired employees.

AVAILABILITY OF REPLACEMENT PARTS

Not Applicable as MCCi is a software-based company.

LIFE EXPECTANCY OF EQUIPMENT UNDER NORMAL USE

Not Applicable as MCCi is a software-based company.

DETAILED INFORMATION AS TO PROPOSED RETURN POLICY ON ALL EQUIPMENT

Any product returns are subject to the manufacturer’s return policy.

PRODUCTS

VENDOR SHALL PROVIDE EQUIPMENT, MATERIALS AND PRODUCTS THAT ARE NEW UNLESS OTHERWISE SPECIFIED, OF GOOD QUALITY AND FREE OF DEFECTS

Not Applicable as MCCi is a software-based company.

CONSTRUCTION

VENDOR SHALL PERFORM SERVICES IN A GOOD AND WORKMANLIKE MANNER AND IN ACCORDANCE WITH INDUSTRY STANDARDS FOR THE SERVICE PROVIDED.

MCCi represents and warrants that it will perform all services in a timely, professional, and workmanlike manner, with a level of care, skill, practice, and judgment consistent with best industry standards and practices. MCCi uses personnel with qualifications, proficiency, and experience and will devote resources to meet all obligations.

We are fanatical about client success. Success starts with our eagerness to understand our clients’ goals.

We do the right thing. Always. We care deeply about serving our clients and maintaining a solid reputation for always doing what’s right – even when it’s not easy. We know that the work we do has a big impact on our clients’ lives and are committed to doing our work with the highest level of integrity and character.

We innovate and evolve. Our growth initiatives are based on what our clients need and where they are headed. We understand that we must continuously evolve and improve to support our clients.

We are unreasonably picky about our teammates. We believe the execution of team goals requires excellence at every level. Each team member must enjoy hard work and excel at doing their part. We expect and empower our team to grow, professionally and personally.

As referenced in the Master Agreement, MCCi (including any MCCi Order Fulfiller) and Participating Agency will enter into supplemental terms and conditions as part of establishing a new contract and for subsequent orders related to this NCPA contract.

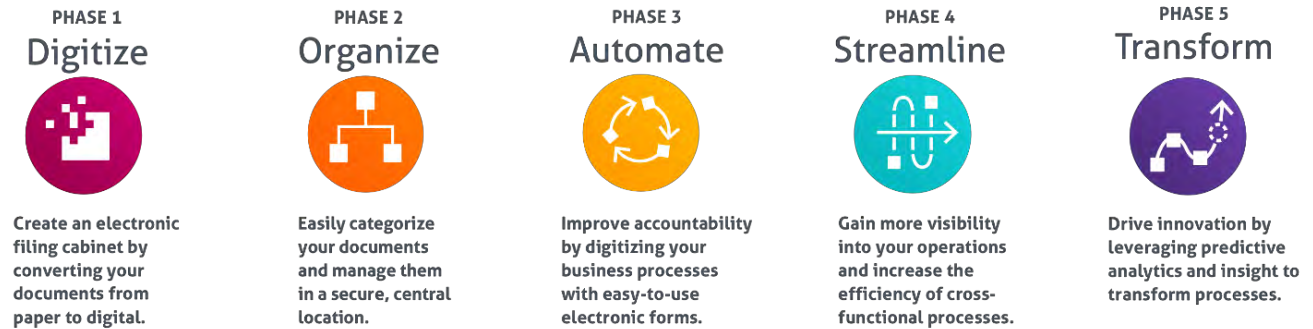
1. CATEGORIES

CATEGORY	PROPOSED SOLUTION
Enterprise Content Management	Laserfiche
Workflow	Laserfiche
Records Management	Laserfiche
Records Storage	Laserfiche
Document Imaging	MCCI's Scanning Services
Document Management	Laserfiche
Data Backup & Recovery	Laserfiche & MCCI's Managed Cloud
Secure Shredding	MCCI's Scanning Services
Web-Form Software	Laserfiche & OneSpan
Mobile Device Management	Laserfiche
Document Process Automation	Laserfiche, Abbyy, OneSpan, JustFOIA

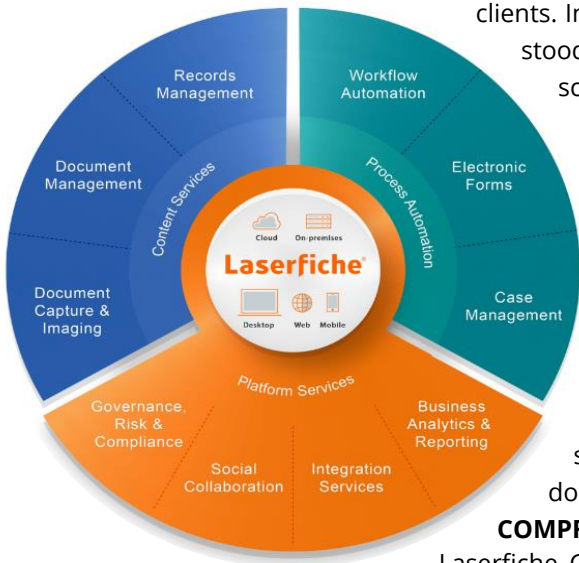
LASERFICHE OVERVIEW

What once was a simple document imaging solution has evolved into a complete Content Services platform to serve the enterprise. In addition to native and core document/records management functionality, Content Services platforms continue to mature and address increasingly complex business processes and problems.

Where to start. MCCi leverages and recommends the Digital Transformation Model: an industry-accepted five-phased approach to transforming your office into a digital workplace. This model provides a structured framework for content services, process automation, analytics, and more. Often, technology is implemented in one department, and the interest of other departments quickly grows. The Digital Transformation Model guides whether you are one department or looking to go enterprise wide.



Select a solution. In 1999, we searched for a solution with company stability, growth, and service commitment to clients. In our search for the best overall Content Services platform, Laserfiche stood out as a solution that meets clients' demands while being economical, scalable, and usable. Laserfiche is a platform for automating business processes from start to finish with the flexibility to integrate with clients' existing solutions. With capabilities ranging from electronic records management to document routing, electronic forms, and integrations, Laserfiche is a powerful solution that enables the entire enterprise. Please keep in mind some of the features of Laserfiche:



USER-FRIENDLY

Laserfiche is very easy to learn, navigate, and use. With a folder structure similar to Windows Explorer, Laserfiche will seem familiar to staff, giving them the confidence to begin scanning and retrieving documents almost immediately after installation.

COMPREHENSIVE SECURITY

Laserfiche Comprehensive Security allows clients to control and administer the security of their documents. Clients determine what functions, such as scanning and printing, each staff member may use.

INTELLIGENT SEARCH

The Laserfiche Search Engine is a powerful tool to help users find the documents they need during their day-to-day processes, including full-text search, index search, and document and folder name. The Laserfiche full-text search unlocks the contents of documents; if users need to find a word or phrase within a document, Laserfiche retrieves it immediately. An easy Google-style toolbar is available for searching as well.

INTEGRATION

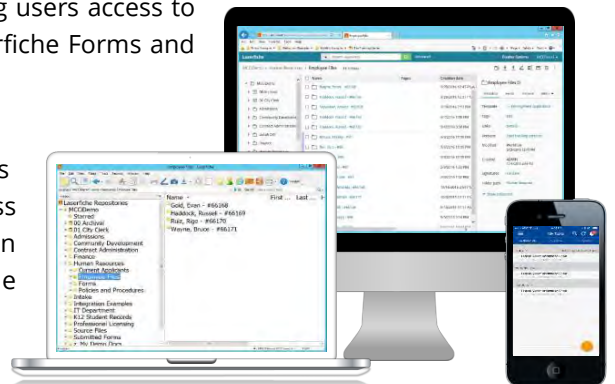
Laserfiche is the central repository for records in clients' organizations and allows them to integrate other main line-of-business solutions easily. Whether clients are looking for a way to integrate with a departmental solution, ERP solution, Microsoft Office application or SharePoint, etc., Laserfiche has options available to reduce duplicate data entry and provides seamless access to their records.

E-FORMS & BUSINESS PROCESS AUTOMATION

Laserfiche allows users to capture information while automating and transforming business processes. Users are finding efficiencies by reducing the time processes take and giving users access to information instantaneously through the implementation of Laserfiche Forms and Laserfiche Workflow, resulting in cost savings for the organization.

MOBILITY & WEB TOOLS

Mobile devices are used in organizations for day-to-day operations. Laserfiche has options available to ensure users can access Laserfiche from these devices and perform related actions quickly on the go. There are also options to give clients' outside citizens/customers access to records through the web to promote transparency and decrease records requests.



LASERFICHE AVANTE

With capabilities ranging from records management to document routing, electronic forms, and digital signatures, Laserfiche Avante provides an easy-to-use, cost-effective platform that enables efficiency and optimizes the decision-making process with the right content in the right hands at the right time.

As an organization continues to grow, Laserfiche offers an upgrade path to the enterprise Rio platform that provides additional robust capabilities.

Each Laserfiche Avante System and Full Named User includes:

- One (1) Laserfiche Application Server & Repository
- Windows, Web, and Mobile Clients
- Laserfiche Snapshot & Email
- Laserfiche Workflow
- Laserfiche Forms Essentials
- Laserfiche Integration with Microsoft Office

LASERFICHE RIO

By providing unlimited document repositories and servers, Laserfiche Rio supports development, testing, staging, and production, putting clients in complete control of their business processes and system design. With capabilities ranging from records management to document routing, electronic forms, and digital signatures, Laserfiche Rio provides an easy-to-use, cost-effective platform for automating day-to-day business processes.

Each Laserfiche Rio System and Full Named User includes:

- Unlimited Laserfiche Application Servers
- Unlimited Laserfiche Repositories
- Windows, Web, and Mobile Clients
- Laserfiche Advanced Audit Trail
- Laserfiche Snapshot & Email
- Laserfiche Workflow
- Laserfiche Forms Essentials
- Laserfiche Digital Signatures
- Laserfiche Discussions
- Laserfiche Integration with Microsoft Office

LASERFICHE SUBSCRIPTION

Unlike purchased perpetual licensing, Laserfiche Subscription lowers clients' initial licensing costs based on *subscribing* to the rights to use Laserfiche products and services instead of *owning* them. With included functional ranging from records management (DoD 5015.2 certified) to document routing, electronic forms, and batch processing tools, Laserfiche Subscription provides an easy-to-use, cost-effective platform to automate day-to-day business processes. By providing unlimited document repositories and servers, Laserfiche Subscription supports development, testing, staging and production, putting clients in complete control of their business processes and system design.

LASERFICHE CLOUD

Similar to Laserfiche Subscription, Laserfiche Cloud lowers initial licensing costs based on *subscribing* to the rights to use Laserfiche products and services instead of *owning* them. With included functional ranging from records management (DoD 5015.2 certified) to document routing, electronic forms, and batch processing tools, Laserfiche Subscription provides an easy-to-use, cost-effective platform to automate day-to-day business processes.

The Laserfiche Cloud license introduces a straightforward annual fee, including software licenses, hosted storage, technical support, and software updates.

LASERFICHE LICENSING GUIDE

LASERFICHE PLATFORM ARCHITECTURE		
	Avante	Rio
Application Servers	1	Unlimited
Repositories	1-15 (1 included)	Unlimited
Database Options	SQL Express, SQL	SQL
Web Admin Console	Included	Included (Directory Server)
FULL USE ACCESS LICENSES		
Full Named Users	Minimum of 1	Minimum of 25
Workflow	Included	Included
Snapshot	Included	Included
Email	Included	Included
Web Client	Included	Included
Mobile Access	Included	Included
Digital Signatures	Add-on Option	Included
Audit Trail	Add-on Option (Starter, Standard, Advanced)	Included (Advanced)
ScanConnect	Add-on Option	Add-on Option
Connector	Add-on Option	Add-on Option
Forms Essentials	Included with v10.2.1+	Included with v10.2.1+
Forms Professional	Add-on Option	Add-on Option
LIMITED USE ACCESS LICENSES		
Retrieval Named Users	Not Available	Minimum of 200 only if currently owned
Forms Authenticated Participants	Add-on Option only if currently owned	Add-on Option only if currently owned
Participant Users	Add-on Option	Add-on Option
Participant Users (Subscription)	Add-on Option w/LFDS	Add-on Option
Community Users (Subscription)	Add-on Option w/LFDS	Add-on Option
Education Users (Subscription)	Add-on Option w/LFDS	Add-on Option
Process Users (Subscription)	Add-on Option w/LFDS	Add-on Option
Enterprise Identity Management	Not Available	Add-on Option*
MODULE BASED LICENSES		
Import Agent	Add-on Option	Add-on Option
Public Portal (WebLink) †	Options: Web Distribution (5), Starter (10), Standard (25), Midsize (50), Unlimited	Options: Pilot (25), Unlimited (1, 2 or Unlimited Laserfiche Application Server(s))
Records Management	Add-on Option	Add-on Option
Quick Fields ††	Add-on Option	Add-on Option
Forms Portal	Add-on Option	Add-on Option
Enterprise Forms Portal #	Add-on Option	Add-on Option

† Public Portal is licensed per Laserfiche Application Server; Web Distribution version only comes with 1 security profile

†† Quick Fields is licensed per machine rather than per user, except on Subscription and Cloud where the number of available installations is limited to the number of named users. Multiple Quick Fields modules/options are available dependent upon platform.

Enterprise Forms Portal allows for Forms Portal to be activated on more than one Laserfiche Forms Application Server

*Licensed by total number of users (Named, Participant, Community and Education).

LASERFICHE DEFINITIONS

LASERFICHE WORKFLOW

Automates business processes, such as approvals, routing based on conditions, or database integrations, improving consistency with how records are filed in Laserfiche.

LASERFICHE SNAPSHOT

Print directly into Laserfiche, capturing a “snapshot” of the electronic file at the time. These files are saved in TIFF format, an unalterable image.

LASERFICHE EMAIL PLUG-IN

Allows instant electronic document distribution via standard MAPI-compliant e-mail applications. This feature is included in every Full User and Retrieval User license.

LASERFICHE WEB CLIENT

A web-based thin client, offering virtually all document management capabilities of the standard Laserfiche interface. Web Client allows the client’s IT staff to roll out high-volume Laserfiche access and version updates without increasing the client’s organization’s application support burden. Web Client also includes access to Laserfiche Mobile and the Laserfiche SharePoint Integration resources.

LASERFICHE SHAREPOINT INTEGRATION

The SharePoint Integration (SPI) is built on the power of Laserfiche Web Access, a Section 508-compliant thin client that reduces installation, support, and maintenance requirements. The integration requires a self-hosted installation of SharePoint.

LASERFICHE MOBILE/WEB CLIENT LIGHT

Allows organizations to access the features of the Laserfiche Client through a smartphone or tablet. They can remotely capture, edit, and search for documents, interact with Laserfiche Forms, and start/participate in a business process. Mobile is available for iOS, Windows, and Android devices. Laserfiche Web Client or Laserfiche Forms is required for any/all mobile access options.

LASERFICHE DIGITAL SIGNATURES

A way of indicating that a document signature is authentic and has not been modified since the signature was applied. Allows users to automatically sign and validate documents directly in the Laserfiche Client or Laserfiche Web Access.

LASERFICHE AUDIT TRAIL MODULES

STARTER EDITION

Tracks basic events that occur in the repository and that involve accessing, modifying, or exporting data. Basic events include creating, editing, printing, or deleting documents, creating annotations, and assigning metadata.

STANDARD EDITION

Builds on the Starter Edition by tracking additional security/access-related events, and unsuccessful attempts to perform actions, such as failed attempts to access or print documents.

ADVANCED EDITION

All the functionality of the other two editions, and tracks more events including password changes, creation or modification of users and groups, and changes to repository-wide settings. It can also track all searches users perform, require users to enter reasons for performing certain actions, and automatically add watermarks to printed documents.

LASERFICHE SCANCONNECT™

A collection of ISIS scanner drivers is included with Laserfiche ScanConnect™. ScanConnect™ can be purchased as an add-on to both Laserfiche scanning and Quick Fields.

LASERFICHE FORMS

Laserfiche Forms allows organizations to create electronic fillable forms for collection and processing information and has flexible design options to meet the client's organization's needs. Users can:

- Create custom forms from a library of field or selection elements.
- Utilize the Business process library (Laserfiche Forms version 10.1 or later) which includes a digital library of prebuilt form templates designed for easier process automation deployment
- Automate business processes for form data to follow, such as decision-making, emailing, or approvals (dynamic behaviors available with CSS and JavaScript).
- Create role-based security is included to allow and restrict access to necessary functions for form submitters, reviewers, approvers, form creators, and system administrators.

Reporting tools allow different views of details on submitted forms such as:

- User view of details about all submitted forms.
- Approver "dashboard" of submissions awaiting approval.
- Administrator views of all submissions by form and approval status.
- Forms can be used internally or externally (with the appropriate licensing). Publication options include a login to forms system, public URL, secure URL, or embedded into a webpage.

Feature	Forms Essentials	Forms Professional
Business process and form creation functionality*	■	■
Operational Dashboard	■	■
View basic reports on process instances, tasks, and process data	■	■
Teams	■	■
Direct Approval through Email	■	■
Database Lookups		■
Performance Dashboard		■
Enhanced reporting with built-in data aggregation options such as count, sum, min, max, average, and median		■
Create advanced reports with data visualizations including charts and graphs		■
Payment Gateway (Compatible Payment Processor Account Required)		■

* Includes JavaScript/CSS, field rules, and form themes

LASERFICHE FORMS PORTAL MODULE

The Forms Portal license allows form submission from unlicensed (public) users. Forms Portal is designed primarily for non-internal/public user submissions, therefore there is no Windows Authentication security validation provided. The users that access forms through the Forms Portal can only submit forms (these users cannot participate in the business process after a form has been submitted). The Forms Portal is licensed to a specific forms instance/server, rather than to the Laserfiche Application Server. Please note that if an organization desires to have a Forms Portal for internal users, as well as a Forms Portal for external users, and security protocol requires that these two Forms Portals reside on separate servers (one internal one external), Enterprise Forms Portal or multiple Forms Portal licenses are required.

LIMITED USE ACCESS LICENSES

Laserfiche offers limited use and more affordable licensing options for clients in need of only a subset of modules/features for a particular use case and/or group of users. The benefits of each option listed below is only available if purchased by the client as defined in the Pricing section.

RETRIEVAL NAMED USERS

For users in need of read-only repository access. The Laserfiche email plug-in is included, and access is available through the Laserfiche Client or Laserfiche Web Access.

LASERFICHE PARTICIPANT USERS

For users who do not have the need/budget for a Full Named User License/Forms Professional license but do have the need for authenticated access to submit forms, complete forms task, view shared report snapshots, and view documents in the repository.

SUBSCRIPTION LASERFICHE PARTICIPANT USERS

For employees in need of read-only repository access and the ability to participate in forms processes.

SUBSCRIPTION LASERFICHE COMMUNITY USERS

For non-employees and non-contractors. Provides read-only repository access and ability to participate in forms processes (i.e., Vendor Management).

SUBSCRIPTION LASERFICHE EDUCATION USERS

For accredited educational institutions that meet the requirements listed. Licenses are reserved for the education community including faculty, students, alumni, and parents and guardians of students. Faculty includes professors (assistant, adjunct, associated, tenured), lecturers, and researchers. Provides read-only repository access and ability to participate in forms processes.

- **Educational Institutions:** Defined as an accredited school organized and operated exclusively for educational purposes. An accredited school must be:
 - A public or private K-12, vocational school, correspondence school, junior college, college, university, or scientific or technical institution accredited by associations recognized by the US Department of Education and/or the State Board of Education.
 - A preschool that meets all of the following:
 - is an early childhood program that serves a minimum of ten children ages 2-5
 - has been in operation for at least one (1) year and provides educational services
- **Administrative Offices or Boards of Education:**
 - A district, regional, or state administrative offices of public educational institutions.
 - Administrative entities organized and operated exclusively for the administration of private educational institutions.
 - Other state or local government entities, nearly all of whose activities consist of administrative support, of a nature that advances academic learning for public educational institutions.
 - Administrative offices or boards of education of educational institutions: defined as district, regional, and state administrative offices of the foregoing educational institutions defined above.
- **Full- and part-time faculty and staff of educational institutions:**
 - Defined as all full and part time faculty and staff of educational institutions defined above
- **Full- and part-time matriculated students of higher education institutions:**
 - Defined as full and part-time matriculated students of a higher education institution defined as a public or private vocational school, correspondence school, junior college, college, university, or scientific or technical institution accredited by associations recognized by the State Board of education and/or the U.S. Department of Education.

LASERFICHE IMPORT AGENT

Automatically retrieves files stored in a Windows folder and imports them into a Laserfiche repository, performing OCR as part of the process.

LASERFICHE PUBLIC PORTAL - WEBLINK™

The WebLink™ module publishes select documents in a Laserfiche repository to an intranet or the Internet in read-only form. Built on ASP Microsoft .NET Framework, WebLink™ can be customized to match the look and feel of an organization's Internet or intranet site.

LASERFICHE RECORDS MANAGEMENT

The Records Management module allows for managing the complete life cycle of records in Laserfiche to include retention schedule management, legal holds/record freezes, disposition, and vital record management, etc.

LASERFICHE QUICK FIELDS (QF) BATCH PROCESSING TOOLS

High volume capture software that automates document import, classification, and indexing. Quick Fields transforms data capture from a costly and labor-intensive operation into an efficient process, improving the speed and accuracy of data capture. QF is a prerequisite for the following:

QF BAR CODE VALIDATION PACKAGE

The Bar Code add-on reads bar codes on a specified page, identifying pages, populating fields, determine document names, or determining file location. Bar Code is very powerful when combined with Real Time Lookup. Supported barcode formats: Coda bar, CODE 39, CODE 128, EAN 8, EAN 13, Interleaved 2 of 5, UPCA, and UPCE.

QF REAL-TIME LOOK UP VALIDATION PACKAGE

Lookup populates template fields and validates metadata by retrieving data stored in third-party databases and other applications.

QF ZONE OCR VALIDATION PACKAGE

The Zone OCR (Optical Character Recognition) add-on will scan a specific zone on an image for text. The data returned by this process can be used for identifying pages, populating fields, determining document names, or determining file location.

QF FORMS ALIGNMENT

Automatically repositions scanned documents to match a master form, correcting for scanning errors and improving data extraction.

QF DOCUMENT CLASSIFICATION

Designed for clients who handle multiple forms and document types.

QF AUTO STAMP/REDACTION/BATES NUMBERING

A document auto-numbering annotation option.

QF OPTICAL MARK RECOGNITION

Detects handwritten information, including marks on surveys.

QF AGENT

Enables administrators to schedule QF processing without operator intervention.

QF FORMS IDENTIFICATION

Automatically recognizes the document based on its overall structure, even in the absence of bar codes, form data or other distinguishing information.

QF FORMS EXTRACTOR

Removes form outlines to isolate data for more accurate capture.

QF SCRIPTING KIT

Offers a QF script editor, allowing developers to write C# and VB Microsoft .NET Framework Scripts.

LASERFICHE ENTERPRISE IDENTITY MANAGEMENT SUBSCRIPTION

The Enterprise Identity Management add-on expands out Laserfiche Directory Server capabilities, making it easier for enterprise organizations to manage users at scale. This includes on-demand (just-in-time) license provisioning to onboard SAML and Active Directory (AD) users automatically as they login to Laserfiche for the first time, as well as a self-service portal where users can upgrade their license type. Additionally, documentation for the LFDS API is available, including code samples, to support the development of custom on-boarding user flows. This add-on is particularly relevant for organizations with SAML or enterprise organizations (500+ employees, 1,000+ licenses) with AD. This product requires an SOW for implementation.

LASERFICHE SUBSCRIPTION LICENSING GUIDE

LASERFICHE PLATFORM ARCHITECTURE			
	Starter	Professional	Business
Application Servers	1	Unlimited	Unlimited
Repositories	1	15	15
Database Options	SQL Express	SQL	SQL
FULL USE ACCESS LICENSES			
	Starter	Professional	Business
Full Named Users	Minimum of 1	Minimum of 10	Minimum of 25
Snapshot	Included	Included	Included
Email	Included	Included	Included
Web Client	Included	Included	Included
Mobile Access	Included	Included	Included
Audit Trail	Included (Starter)	Included (Starter) Advanced is Add-on Option	Included (Advanced)
Workflow	Not Available	Included	Included
Connector	Not Available	Included	Included
Forms Professional	Not Available	Included	Included
Enterprise Identity Management	Not Available	Not Available	Included
LIMITED USE ACCESS LICENSES			
	Starter	Professional	Business
Participant Users	Not Available	Add-on Option, Minimum of 10	Add-on Option, Minimum of 10
Community Users	Not Available	Add-on Option	Add-on Option
Education Users	Not Available	Add-on Option	Add-on Option
MODULE BASED LICENSES			
	Starter	Professional	Business
Import Agent with Email Archiving	Included	Included	Included
ScanConnect	Add-on Option	Add-on Option	Add-on Option
Public Portal (WebLink) †	Options: Public Portal for 1, 2 and Unlimited Laserfiche Servers	Options: Public Portal for 1, 2 and Unlimited Laserfiche Servers	Unlimited Public Portal Included
Records Management	Not Available	Add-on Option	Included
Quick Fields Complete with Agent ††	Add-on Option	10 Installations Included	10 Installations Included
Forms Portal †	Not Available	Add-on Option	3 Instances of Forms Portal Included
Sandbox*	Add-on Option	Add-on Option	3 Sandboxes Included
INTEGRATIONS			
	Starter	Professional	Business
Microsoft 365 Integration with Simultaneous Editing	Included	Included	Included
Integration with SharePoint Federated Search	Included	Included	Included
Integration with DocuSign	Not Available	Included	Included
Integration with LaserApp	Add-on Option	Add-on Option	Included
Integration with LaserApp	Add-on Option	Add-on Option	Add-on Option
Laserfiche for Ricoh MFD	Add-on Option	Add-on Option	Add-on Option
Certified Integration with SAP ArchiveLink	Add-on Option	Add-on Option	Add-on Option

† Public Portal and Forms Portal are licensed per Laserfiche Application Server.

†† Quick Fields is licensed per machine.

* A sandbox environment includes 10 users, Laserfiche Directory Server and any additional add-ons purchased, such as portals.

LASERFICHE SUBSCRIPTION DEFINITIONS

LASERFICHE SUBSCRIPTION

Laserfiche Subscription licensing is a self-hosted subscription license and allows organizations to access the entire Laserfiche product suite at a cost-effective price point. It is accessible, convenient, and designed to help the client's organization scale. With Laserfiche Subscription, the client has the flexibility to manage licenses based on user roles or expected growth so they can easily scale their deployment within their organization. All Laserfiche Subscription tiers include:

- **Web Client:** Enables subscription users to access content through a web browser.
- **Laserfiche Mobile:** An app (Android and Apple) that enables users to capture, upload, and securely access and work with documents inside Laserfiche while on the go.
- **Laserfiche Snapshot:** "Print" electronic documents into the client's repository as TIFF images with this virtual printer. Laserfiche Snapshot works as though the client had printed the document and then scanned it back into Laserfiche but allows them to skip the step of making a physical printed copy.
- **Audit Trail:** Track activities performed in a Laserfiche repository and generate reports. Auditing helps to show compliance with legal regulations and contributes to the security of the Laserfiche repository.
- **Automated text extraction:** Automatically extract specific text.
- **Import Agent with Email Archive:** A tool for automatically importing files into the Laserfiche repository from a Windows folder, and the Email Archive allows the client to automatically archive emails to Laserfiche. Email Archive can extract and assign metadata to the emails saved in Laserfiche, as well as extract and save attachments and the email's distribution list file.
- **Microsoft Office Integration:** Integration with Microsoft Office® Suite. Allows for direct content import as well as indexing capabilities. As a part of this integration, emails and attachments stored in Outlook can be imported to the repository with a single click and auto indexed with information such as sender, subject, time received, etc.
- **Integration with SharePoint:** The SharePoint Integration (SPI) is built on the power of Laserfiche Web Client, a Section 508-compliant thin client that reduces installation, support, and maintenance requirements. The integration requires a self-hosted installation of SharePoint.

LASERFICHE STARTER SUBSCRIPTION ADD-ONS

These items are optional and are only part of the proposed solution if included in the pricing.

- **ScanConnect™:** Enables the use of ISIS scanning drivers with Laserfiche scanning.
- **Quick Fields Complete with Agent:** An advanced automated data capture solution. The complete suite of modules for Quick Fields are included along with Agent that allows scheduled automated processing sessions around the clock, without operator intervention.
- **Public Portal:** Share documents with people outside the organization, providing read-only access to specific documents without signing in.
- **Sandbox:** A sandbox environment includes 10 users, Laserfiche Directory Server and any additional add-ons purchased, such as portals.
- **Laserfiche Integration with DocuSign:** Initiate a signing process from within Laserfiche Cloud. Users may select the type of signing process they are initiating and attach documents that need to be a part of that process. Once the signing process completes, documents are imported back into the Laserfiche Repository from DocuSign as new versions of the un-signed document. Information captured during the signing process may be mapped to Laserfiche metadata fields.

- **Certified Integration with SAP ArchiveLink:** Allows the client to configure a Laserfiche repository as a content repository in SAP. Archive content from SAP in Laserfiche as well as search, retrieve, update, and delete archived content.
- **Integration with LaserApp:** Provides forms filling solutions for broker-dealers, financial advisors, insurance agents, and others in the financial industry.
- **Laserfiche for Ricoh MFD:** A single integrated solution in which scanning, searching, browsing, and printing from the Laserfiche Server can be performed.

LASERFICHE PROFESSIONAL SUBSCRIPTION

Please refer to the [Pricing](#) section to determine which package was quoted. This functionality provides many tools to automate business processes and reduce manual work. These tools include:

- **Full SQL Support**
- **15 Repositories per Laserfiche Application Server**
- **Workflow:** Automates business processes, such as approvals, routing based on conditions, or database integrations, improving consistency with how records are filed in Laserfiche.
- **Forms Professional:** Laserfiche Forms allows organizations to create electronic fillable forms for collection and processing information and has flexible design options to meet the client's organization's needs. Users can:
 - Create custom forms from a library of field or selection elements.
 - Utilize the Business process library includes a digital library of prebuilt form templates designed for easier process automation deployment
 - Automate business processes for form data to follow, such as decision-making, emailing, or approvals (dynamic behaviors available with CSS and JavaScript).
 - Create role-based security to allow and restrict access to necessary functions for form submitters, reviewers, approvers, form creators, and system administrators.

Reporting tools allow different views of details on submitted forms such as:

- User view of details about all submitted forms.
- Approver "dashboard" of submissions awaiting approval.
- Administrator views of all submissions by form and approval status.
- Forms can be used internally or externally (with the appropriate licensing). Publication options include a login to forms system, public URL, secure URL, or embedded into a webpage.
- **Reporting and Analytics:** Use out-of-the-box reports or create custom reports on process data for insights to make informed decisions.
- **Connector:** Provides a no-code means for integrating Laserfiche with line-of-business applications.
- **Quick Fields Complete with Agent:** An advanced automated data capture solution. The complete suite of modules for Quick Fields is included along with Agent that allows scheduled automated processing sessions around the clock, without operator intervention.
- **Federated Search:** A web application that allows the client to perform searches across multiple repositories at the same time.

LASERFICHE PROFESSIONAL SUBSCRIPTION ADD-ONS

These items are optional and are only part of the proposed solution if included in the pricing.

- **Public Portal:** Share documents with people outside the organization, providing read-only access to specific documents without signing in.
- **Forms Portal:** Allow non-authenticated users to view and submit public starting forms.
- **Sandbox:** A sandbox environment includes ten (10) users, Laserfiche Directory Server and any additional add-ons purchased, such as portals.

- **Records Management Edition:** Process records and record folders according to a life cycle, through creation, retrieval, storage, and disposition.
- **Participant Users:** For employees in need of read-only repository access and the ability to participate in forms processes. Education Participants are available for educational institutions.
- **Community Users:** For non-employees and non-contractors. Provides read-only repository access and ability to participate in forms processes (E.g., Vendor Management, Residents).
- **SDK:** Access to the same Web Services, APIs and libraries for integration with other applications.
- **ScanConnect:** Enables the use of ISIS scanning drivers with Laserfiche scanning.
- **Laserfiche Integration with DocuSign:** Initiate a signing process from within Laserfiche Cloud. Users may select the type of signing process they are initiating and attach documents that need to be a part of that process. Once the signing process completes, documents are imported back into the Laserfiche Repository from DocuSign as new versions of the un-signed document. Information captured during the signing process may be mapped to Laserfiche metadata fields.
- **Certified Integration with SAP ArchiveLink:** Allows the client to configure a Laserfiche repository as a content repository in SAP. Archive content from SAP in Laserfiche as well as search, retrieve, update, and delete archived content.
- **Integration with LaserApp:** This is a third-party application that helps Financial Services clients fill out and file forms. Using the Laserfiche integration with Laser App, the client can then store those forms in Laserfiche, and extract information from Client's forms to populate Laserfiche metadata.
- **Laserfiche for Ricoh MFD:** A single integrated solution in which scanning, searching, browsing, and printing from the Laserfiche server can be performed.

LASERFICHE BUSINESS SUBSCRIPTION

Please refer to the [Pricing](#) section to determine which package was quoted. This functionality provides many tools to automate business processes and reduce manual work. These tools include:

- **Full SQL Support**
- **15 Repositories per Laserfiche Application Server**
- **Workflow:** Automates business processes, such as approvals, routing based on conditions, or database integrations, improving consistency with how records are filed in Laserfiche.
- **Forms Professional:** Laserfiche Forms allows organizations to create electronic fillable forms for collection and processing information and has flexible design options to meet the client's organization's needs. Users can:
 - Create custom forms from a library of field or selection elements.
 - Utilize the Business process library includes a digital library of prebuilt form templates designed for easier process automation deployment.
 - Automate business processes for form data to follow, such as decision-making, emailing, or approvals (dynamic behaviors available with CSS and JavaScript).
 - Create role-based security is included to allow and restrict access to necessary functions for form submitters, reviewers, approvers, form creators, and system administrators.

Reporting tools allow different views of details on submitted forms such as:

- User view of details about all submitted forms.
- Approver "dashboard" of submissions awaiting approval.
- Administrator views of all submissions by form and approval status.
- Forms can be used internally or externally (with the appropriate licensing). Publication options include a login to forms system, public URL, secure URL, or embedded into a webpage.
- **Reporting and Analytics:** Use out-of-the-box reports or create custom reports on process data for insights to make informed decisions.

- **Connector:** Provides a no-code means for integrating Laserfiche with line-of-business applications.
- **Records Management Edition:** Process records and record folders according to a life cycle, through creation, retrieval, storage, and disposition.
- **Enterprise Identity Management:** The Enterprise Identity Management add-on expands out Laserfiche Directory Server capabilities, making it easier for enterprise organizations to manage users at scale. This includes on-demand (just-in-time) license provisioning to onboard SAML and Active Directory (AD) users automatically as they login to Laserfiche for the first time, as well as a self-service portal where users can upgrade their license type. Additionally, documentation for the LFDS API is available, including code samples, to support the development of custom on-boarding user flows. This add-on is particularly relevant for organizations with SAML or enterprise organizations (500+ employees, 1,000+ licenses) with AD. This product requires an SOW for implementation.
- **SDK:** Access to the same Web Services, APIs and libraries for integration with other applications.
- **Quick Fields Complete with Agent:** An advanced automated data capture solution. The complete suite of modules for Quick Fields are included along with Agent that allows scheduled automated processing sessions around the clock, without operator intervention.
- **Public Portal:** With unlimited views, share documents with people outside the organization, providing read-only access to specific documents without signing in.
- **Forms Portal:** With unlimited submissions, allow non-authenticated users to view and submit public starting forms. Laserfiche Business Subscription comes with three (3) installations of Forms Portal.
- **Sandbox:** A sandbox environment includes ten (10) users, Laserfiche Directory Server and any additional add-ons purchased, such as portals. Laserfiche Business Subscription comes with three (3) sandboxes.
- **Federated Search:** A web application that allows the client to perform searches across multiple repositories at the same time.
- **Laserfiche Integration with DocuSign:** Initiate a signing process from within Laserfiche Cloud. Users may select the type of signing process they are initiating and attach documents that need to be a part of that process. Once the signing process completes, documents are imported back into the Laserfiche Repository from DocuSign as new versions of the un-signed document. Information captured during the signing process may be mapped to Laserfiche metadata fields.

LASERFICHE BUSINESS SUBSCRIPTION ADD-ONS

- **Participant Users:** For employees in need of read-only repository access and the ability to participate in forms processes. Education Participants are available for educational institutions.
- **Community Users:** For non-employees and non-contractors. Provides read-only repository access and ability to participate in forms processes (E.g., Vendor Management, Residents).
- **ScanConnect:** Enables the use of ISIS scanning drivers with Laserfiche scanning.
- **Certified Integration with SAP ArchiveLink:** Allows the client to configure a Laserfiche repository as a content repository in SAP. Archive content from SAP in Laserfiche as well as search, retrieve, update, and delete archived content.
- **Integration with LaserApp:** This is a third-party application that helps Financial Services clients fill out and file forms. Using the Laserfiche integration with Laser App, the client can then store those forms in Laserfiche, and extract information from their forms to populate Laserfiche metadata.
- **Laserfiche for Ricoh MFD:** A single integrated solution in which scanning, searching, browsing, and printing from the Laserfiche Server can be performed.

LASERFICHE CLOUD LICENSING GUIDE

LASERFICHE PLATFORM ARCHITECTURE			
	Starter	Professional	Business
App. Servers/Repositories	1	1	1
FULL USE ACCESS LICENSES			
	Starter	Professional	Business
Full Named Users	Minimum of 1	Minimum of 5	Minimum of 25
100 GB Storage Per User	Included Additional Storage Available	Included Additional Storage Available	Included Additional Storage Available
Audit Trail	Included (Starter)	Included (Starter) Advanced is Add-on Option	Included (Advanced)
Direct Share	Included	Included	Included
Automated/Encrypted Backups	Included	Included	Included
Intrusion Detection	Included	Included	Included
Automated Feature and Security Updates	Included	Included	Included
Import Agent w/Email Archiving	Included	Included	Included
Process Automation	Not Available	Included	Included
Connector	Not Available	Included	Included
Surveys	Not Available	Included	Included
Records Management	Not Available	Add-on Option	Included
LIMITED USE ACCESS LICENSES			
	Starter	Professional	Business
Participant Users	Not Available	Add-on Option, Minimum of 10	Add-on Option, Minimum of 10
Community Users	Not Available	Add-on Option	Add-on Option
Education Users	Not Available	Add-on Option	Add-on Option
MODULE BASED LICENSES			
	Starter	Professional	Business
Quick Fields Complete with Agent ††	Add-on Option	10 Installations Included	10 Installations Included
Invoice Smart Capture	Not Available	Add-on Option	Add-on Option
Workflow Bots	Not Available	1 Included with Option to Add-on	1 Included with Option to Add-on
Vault	Add-on Option	Add-on Option	Add-on Option
ScanConnect	Add-on Option	Add-on Option	Add-on Option
SDK	Not Available	Add-on Option	Included
Public Portal (WebLink) †	Not Available	Options: 1,000 Views, Blocks of 10,000 Views	Unlimited Views
Forms Portal †	Not Available	Options: 1,000 Submissions, Blocks of 10,000 Submissions	Unlimited Submissions
INTEGRATIONS			
	Starter	Professional	Business
Microsoft 365 Integration with Simultaneous Editing	Included	Included	Included
Integration with SharePoint	Included	Included	Included
Integration with Salesforce, Microsoft Dynamics 365, and Redtail CRMs	Not Available	Included	Included
Integration with DocuSign	Add-on Option	Add-on Option	Included
Integration with Ellucian Ethos	Not Available	Add-on Option	Add-on Option
Integration with LaserApp	Add-on Option	Add-on Option	Add-on Option
Laserfiche for Ricoh MFD	Add-on Option	Add-on Option	Add-on Option
Certified Integration with SAP ArchiveLink	Add-on Option	Add-on Option	Add-on Option

† Public Portal and Forms Portal are licensed per Laserfiche Application Server.

†† Quick Fields is licensed per machine.

* A sandbox environment includes 10 users, laserfiche directory server and any additional add-ons purchased, such as portals.

LASERFICHE CLOUD DEFINITIONS

LASERFICHE CLOUD

Laserfiche Cloud is a Software as a Service (SaaS) solution, which provides a central digital repository accessible from anywhere. With Laserfiche cloud the client can upload, view, and modify content within a streamlined fully responsive web interface. In addition to the central repository, below are some of the great features that come with Laserfiche Cloud. The Laserfiche Cloud license introduces a straightforward annual fee including software licenses, hosted storage, technical support and software updates. The licensing option provides the SaaS solution hosted on Amazon Web Services. All Laserfiche Cloud tiers include:

- **100 GB Per User**
- **Web Client:** Enables subscription users to access content through a web browser.
- **Laserfiche Mobile:** An app (Android and Apple) that enables Client to capture, upload, and securely access and work with documents inside Laserfiche while on the go.
- **Laserfiche Snapshot:** "Print" electronic documents into Client's repository as TIFF images with this virtual printer. Laserfiche Snapshot works as though Client had printed the document and then scanned it back into Laserfiche but allows Client to skip the step of making a physical printed copy.
- **Direct Share:** Allows Client to share content from the Laserfiche repository with external users through the Web Client or Mobile App. When Client sends documents through direct share, the recipient will receive a unique and anonymized URL that they can use to access the files for a limited period of time. One can add a password and specify the number of days until the URL expires. The sender will receive notifications when the content was viewed, and a repository administrator can see the status of who shared it, with whom, and if and when it was accessed.
- **Audit Trail:** Track activities performed in a Laserfiche repository and generate reports. Auditing helps to show compliance with legal regulations and contributes to the security of the Laserfiche repository.
- **Automated text extraction:** Automatically extract specific text.
- **Import Agent with Email Archive:** A tool for automatically importing files into the Laserfiche repository from a Windows folder, and the Email Archive allows Client to automatically archive emails to Laserfiche. Email Archive can extract and assign metadata to the emails saved in Laserfiche, as well as extract and save attachments and the email's distribution list file.
- **Industry-Leading Data Encryption:** For data in transit over public networks, Laserfiche Cloud uses TLS encryption, and AES-256 encryption is utilized for data-at-rest, including backups. Documents are backed up six (6) times a day with the most recent three (3) backups available for a minimum of 14 days.
- **Multi-Factor Authentication:** Multi-factor authenticated can be enabled for a Laserfiche Cloud user account.
- **Single Sign-On:** Laserfiche Cloud supports single sign-on with Active Director Federation Services (AD FS) and Security Assertion Markup Language (SAML).
- **Intrusion Detection:** Laserfiche Cloud utilizes host-based intrusion detection systems to reduce the risk of data theft by individuals or organizations attempting to gain unauthorized access.
- **Microsoft Office Integration:** Integration with Microsoft Office® Suite. Allows for direct content import as well as indexing capabilities. As a part of this integration, emails and attachments stored in Outlook can be imported to the repository with a single click and auto indexed with information such as sender, subject, time received, etc.
- **Integration with SharePoint:** The SharePoint Integration (SPI) is built on the power of Laserfiche Web Client, a Section 508-compliant thin client that reduces installation, support, and maintenance requirements. The integration requires a self-hosted installation of SharePoint.

LASERFICHE CLOUD STARTER ADD-ONS

These items are optional and are only part of the proposed solution if included in the pricing.

- **Additional Storage**
- **Quick Fields Complete with Agent:** An advanced automated data capture solution. The complete suite of modules for Quick Fields are included along with Agent that allows scheduled automated processing sessions around the clock, without operator intervention.
- **Laserfiche Vault:** A solution package that supports financial services firms' compliance with SEC Rule §17a-4 using services and cloud-based features that provide a secure and accurate system of records.
- **ScanConnect:** Enables the use of ISIS scanning drivers with Laserfiche scanning.
- **Laserfiche Integration with DocuSign:** Initiate a signing process from within Laserfiche Cloud. Users may select the type of signing process they are initiating and attach documents that need to be a part of that process. Once the signing process completes, documents are imported back into the Laserfiche Repository from DocuSign as new versions of the un-signed document. Information captured during the signing process may be mapped to Laserfiche metadata fields.
- **Certified Integration with SAP ArchiveLink:** Allows Client to configure a Laserfiche repository as a content repository in SAP. Archive content from SAP in Laserfiche as well as search, retrieve, update, and delete archived content.
- **Integration with LaserApp:** Provides forms filling solutions for broker-dealers, financial advisors, insurance agents, and others in the financial industry.
- **Laserfiche for Ricoh MFD:** A single integrated solution in which scanning, searching, browsing, and printing from the Laserfiche Server can be performed.

LASERFICHE CLOUD PROFESSIONAL

Please refer to the [Pricing](#) section to determine which package was quoted. This functionality provides many tools to automate business processes and reduce manual work. Those tools include:

- **Process Automation:** A unified feature set to digitize and automate business processes. These tasks include moving documents, extracting and inputting data, setting deadlines and more.
 - **Business Process Designer:** Diagram business processes through the process modeler, which is based on business process model and notation (BPMN) standards.
 - **Workflows:** Build processes to extract data, route documents, automate activities, assign team and individual tasks, extract data, route documents, and more without requiring code.
 - **Business Processes & Forms:** Forms allow process managers to create and publish web forms with an intuitive forms management system without requiring coding or scripting.
 - Attractive forms can easily be created with preconfigured templates or customized with editable fonts, colors, uploaded images and layouts.
 - Drag-and-drop form elements including fields, checkboxes, and radio buttons onto a form to collect the exact information needed, in the precise format required.
 - Payment collection allows payment to be collected with Braintree and Authorize Microsoft .NET Framework payment gateways.
 - Automatically apply bulk annotations such as highlights, redactions, strikethroughs, and underlines across documents processed through workflows.
 - Read barcodes on documents as part of automated workflows to better streamline document capture.
 - **Starting Events:** Define how and when processes start.
 - **Business Rules:** Easily define and manage business policy logic such as decision tables and formulas, in a centralized place separately from process logic.
 - **Data Management:** Define data structures and store data independently of processes to provide a single source of truth for data.

- **Capture Profiles:** Capture document information automatically using profiles.
- **Reporting and Analytics:** Use out-of-the-box reports or create custom reports on process data for insights to make informed decisions.
- **Connector:** Provides a no-code means for integrating Laserfiche with line-of-business applications.
- **Surveys:** Design custom surveys, polls, or registration forms to automatically collect information and view results without creating processes or designing reports.
- **Quick Fields Complete with Agent:** An advanced automated data capture solution. The complete suite of modules for Quick Fields are included along with Agent that allows scheduled automated processing sessions around the clock, without operator intervention.
- **Workflow Bots:** Use robotic process automation technology to let Client easily configure software bots to automate repetitive, routine work between multiple systems.
- **Integrations with CRMs:** Laserfiche Cloud includes integrations with Microsoft Dynamics 365, Salesforce and Redtail CRMs.

LASERFICHE CLOUD PROFESSIONAL ADD-ONS

These items are optional and are only part of the proposed solution if included in the pricing.

- **Additional Storage**
- **Public Portal:** Share documents with people outside the organization, providing read-only access to specific documents without signing in.
 - **Note:** Only one (1) security profile is included.
- **Forms Portal:** Allow non-authenticated users to view and submit public starting forms.
- **Records Management Edition:** Process records and record folders according to a life cycle, through creation, retrieval, storage, and disposition.
- **Participant Users:** For employees in need of read-only repository access and the ability to participate in forms processes. Education Participants are available for educational institutions.
- **Community Users:** For non-employees and non-contractors. Provides read-only repository access and ability to participate in forms processes (E.g., Vendor Management, Residents).
- **Smart Invoice Capture:** Smart capture uses machine learning technology to automatically capture information from any invoice, specifically the invoice date, invoice number, purchase order number and total amount due.
- **Laserfiche Vault:** A solution package that supports financial services firms' compliance with SEC Rule §17a-4 using services and cloud-based features that provide a secure and accurate system of records.
- **SDK:** Access to the same Web Services, APIs, and libraries for integration with other applications.
- **ScanConnect:** Enables the use of ISIS scanning drivers with Laserfiche scanning.
- **Laserfiche Integration with DocuSign:** Initiate a signing process from within Laserfiche Cloud. Users may select the type of signing process they are initiating and attach documents that need to be a part of that process. Once the signing process completes, documents are imported back into the Laserfiche Repository from DocuSign as new versions of the un-signed document. Information captured during the signing process may be mapped to Laserfiche metadata fields.
- **Certified Integration with SAP ArchiveLink:** Allows Client to configure a Laserfiche repository as a content repository in SAP. Archive content from SAP in Laserfiche as well as search, retrieve, update, and delete archived content.
- **Integration with LaserApp:** This is a third-party application that helps Financial Services clients fill out and file forms. Using the Laserfiche integration with Laser App, Client can then store those forms in Laserfiche, and extract information from Client's forms to populate Laserfiche metadata.
- **Laserfiche for Ricoh MFD:** A single integrated solution in which scanning, searching, browsing, and printing from the Laserfiche Server can be performed.

- **Ellucian Banner Integration through Ethos:** The integration support pre-populating registrar forms created in Business Process and updating records in Banner with course or student personal information through Workflow.

LASERFICHE CLOUD BUSINESS

Please refer to the [Pricing](#) section to determine which package was quoted. This functionality provides many tools to automate business processes and reduce manual work:

- **Process Automation:** A unified feature set to digitize and automate business processes. These tasks include moving documents, extracting and inputting data, setting deadlines, and more.
 - **Business Process Designer:** Diagram business processes through the process modeler, which is based on business process model and notation (BPMN) standards.
 - **Workflows:** Build processes to extract data, route documents, automate activities, assign team and individual tasks, extract data, route documents, and more without requiring code.
 - **Business Processes & Forms:** Forms allow process managers to create and publish web forms with an intuitive forms management system without requiring coding or scripting.
 - Attractive forms can easily be created with preconfigured templates or customized with editable fonts, colors, uploaded images and layouts.
 - Drag-and-drop form elements including fields, checkboxes, and radio buttons onto a form to collect the exact information needed, in the precise format required.
 - Payment collection allows payment to be collected with Braintree and Authorize Microsoft .NET Framework payment gateways.
 - Automatically apply bulk annotations such as highlights, redactions, strikethroughs, and underlines across documents processed through workflows.
 - Read barcodes on documents as part of automated workflows to better streamline document capture.
 - **Starting Events:** Define how and when processes start.
 - **Business Rules:** Easily define and manage business policy logic such as decision tables and formulas, in a centralized place separately from process logic.
 - **Data Management:** Define data structures and store data independently of processes to provide a single source of truth for data.
 - **Capture Profiles:** Capture document information automatically using profiles.
- **Reporting and Analytics:** Use out-of-the-box reports or create custom reports on process data for insights to make informed decisions.
- **Connector:** Provides a no-code means for integrating Laserfiche with line-of-business applications.
- **Surveys:** Design custom surveys, polls, or registration forms to automatically collect information and view results without creating processes or designing reports.
- **Records Management Edition:** Process records and record folders according to a life cycle, through creation, retrieval, storage, and disposition.
- **Quick Fields Complete with Agent:** An advanced automated data capture solution. The complete suite of modules for Quick Fields are included along with Agent that allows scheduled automated processing sessions around the clock, without operator intervention.
- **Workflow Bots:** Use robotic process automation technology to let Client easily configure software bots to automate repetitive, routine work between multiple systems.
- **Laserfiche Integration with DocuSign:** Initiate a signing process from within Laserfiche Cloud. Users may select the type of signing process they are initiating and attach documents that need to be a part of that process. Once the signing process completes, documents are imported back into the Laserfiche Repository from

DocuSign as new versions of the un-signed document. Information captured during the signing process may be mapped to Laserfiche metadata fields.

- **Public Portal:** With unlimited views, share documents with people outside the organization, providing read-only access to specific documents without signing in.
 - **Note:** Only one (1) security profile is included.
- **Forms Portal:** With unlimited submissions, allow non-authenticated users to view and submit public starting forms.
- **Integrations with CRMs:** Laserfiche Cloud includes integrations with Microsoft Dynamics 365, Salesforce and Redtail CRMs.

LASERFICHE CLOUD BUSINESS ADD-ONS

- **Additional Storage**
- **Participant Users:** For employees in need of read-only repository access and the ability to participate in forms processes. Education Participants are available for educational institutions.
- **Community Users:** For non-employees and non-contractors. Provides read-only repository access and ability to participate in forms processes (E.g., Vendor Management, Residents).
- **Smart Invoice Capture:** Smart capture uses machine learning technology to automatically capture information from any invoice, specifically the invoice date, invoice number, purchase order number and total amount due.
- **Laserfiche Vault:** A solution package that supports financial services firms' compliance with SEC Rule §17a-4 using services and cloud-based features that provide a secure and accurate system of records.
- **Certified Integration with SAP ArchiveLink:** Allows Client to configure a Laserfiche repository as a content repository in SAP. Archive content from SAP in Laserfiche as well as search, retrieve, update, and delete archived content.
- **Integration with LaserApp:** This is a third-party application that helps Financial Services clients fill out and file forms. Using the Laserfiche integration with Laser App, Client can then store those forms in Laserfiche, and extract information from Client's forms to populate Laserfiche metadata.
- **Laserfiche for Ricoh MFD:** A single integrated solution in which scanning, searching, browsing, and printing from the Laserfiche Server can be performed.
- **Ellucian Banner Integration through Ethos:** The integration support pre-populating registrar forms created in Business Process and updating records in Banner with course or student personal information through Workflow.

LASERFICHE INTEGRATIONS DEFINITIONS

LASERFICHE CONNECTOR

Provides a streamlined experience for integrating Laserfiche with line of business applications such as CRM and ERP systems. Laserfiche Connector integrates easily through user-defined hotkeys and embedded icons. Laserfiche Connector allows Client to:

- Search results that will automatically open in the Laserfiche Client, Web Access, or WebLink.
- Scan and automatically populate metadata with information from a third-party application.
- Import and automatically populate metadata with information from a third-party application.
- Connect two (2) applications by allowing one of them to start the other (including the ability to pass parameters between them).
- Choose whether any of the above actions are activated from a keyboard shortcut, a button embedded in the application's title bar, or both.

LASERFICHE INTEGRATOR'S TOOLKIT (SDK)

Provides the tools and documentation necessary for customizing Laserfiche and integrating Laserfiche with other applications.

LASERFICHE INTEGRATOR GP

Empowers Great Plains users to scan, search and link supporting documents in Laserfiche directly from the Great Plains menu bar.

LASERFICHE ENERGOV INTEGRATION BY MCCI

The Laserfiche EnerGov integration offloads the storage of documents from EnerGov to Laserfiche. This allows users to seamlessly store documents that would normally be saved in EnerGov, directly to their Laserfiche system. The integration makes use of the native EnerGov interface for attaching documents. The integration also allows meta-data associated with the EnerGov record to be tied to the entry in Laserfiche. Users wishing to view uploaded documents can do so through the existing EnerGov Interface. Please see "Client Deliverables" for other features available/dependent on EnerGov configuration settings. Each of the following areas are available in the integration configuration settings:

- | | | |
|---------------------------|-------------------------------|---------------------------|
| ▪ EnerGov Application | ▪ EnerGov Invoice | ▪ EnerGov Inspection Case |
| ▪ EnerGov Inspection | ▪ EnerGov Exam Sitting | ▪ EnerGov Exam Request |
| ▪ EnerGov Rental Property | ▪ EnerGov Individual License | ▪ EnerGov Object Case |
| ▪ EnerGov Business | ▪ EnerGov Business License | ▪ EnerGov Citizen Request |
| ▪ EnerGov Plan | ▪ EnerGov Payment | ▪ EnerGov Code Case |
| ▪ EnerGov Permit | ▪ EnerGov Permit Renewal Case | ▪ EnerGov Project |
| ▪ EnerGov Parcel | ▪ EnerGov Global Entity | ▪ EnerGov Impact Case |

PLATFORM AND LICENSING REQUIREMENTS

The EnerGov integration can operate by using two (2) different Laserfiche user licensing options.

- **Recommended:** Utilization of Laserfiche "Keyed Integrator's License for EnerGov", which allows for up to 25 (higher volume packages can be purchased) concurrent connections to Laserfiche. This is the Laserfiche licensing approach recommended. Note that the Keyed Integrator's license is only available for the Laserfiche Avante or RIO platforms.
- **Utilization of current Laserfiche licensing:**

- **Laserfiche Avante or RIO platforms:** A single named user can be used to connect to the Laserfiche server. This user is limited to four (4) concurrent connections at a time, and is the max amount allowed with Laserfiche Avante and RIO platforms.
- **Laserfiche Classic (Team or United) platforms:** A user account can be used to connect to the Laserfiche server; however, it will potentially consume all available concurrent licenses and limit the use of Laserfiche outside of the EnerGov integration. It is recommended that Client upgrades to the Avante or RIO platform, rather than take the risk of utilizing the integration and not having control of license consumption within the Laserfiche Classic (Team or United) platform.
- **EnerGov Compatible Platforms:** The Laserfiche EnerGov Integration is compatible with EnerGov Self-hosted currently. A future release is planned for the EnerGov Cloud platform.
- **EnerGov Licensing Requirements:** EnerGov clients must confirm with EnerGov, their ownership of the needed SDK, API, and/or general EnerGov licensing requirements related to this integration.

ESRI ARCGIS® INTEGRATION FOR LASERFICHE

This is a basic ArcGIS integration that is developed and maintained by a MCCi partner. It allows for easy interaction between the ArcGIS interface and a Laserfiche repository, by allowing users to upload documents to Laserfiche straight from the ArcGIS interface and view any related documents/folders via Laserfiche Weblink or Laserfiche Web Access (requires Laserfiche licensing for Laserfiche Weblink or Web Access). The dynamic ArcGIS map will auto-populate, indicating which features on the map have documents associated with them in Laserfiche.

LT SYSTEMS LASERFICHE INTEGRATION

LT Systems Laserfiche Integration allows users of the LT Systems Court solutions to archive court related documents into Laserfiche. Users can launch Laserfiche scan or searching windows from LT Systems and bring data and documents directly into Laserfiche while capturing metadata in LT Systems. Additionally, there is an automated service that archives Warrants as single documents with the associated metadata, directly from LT systems to Laserfiche.

DOCUSIGN INTEGRATION OPTIONS

LASERFICHE INTEGRATION WITH DOCUSIGN

The Laserfiche Integration with DocuSign enables users to initiate a signing process from within Laserfiche Web Access. Users may select the type of signing process they are initiating and attach documents that need to be a part of that process. Also, once the signing process completes, documents are imported back into the Laserfiche Repository from DocuSign as new versions of the un-signed document. Information captured during the signing process may be mapped to Laserfiche metadata fields.

CITIES DIGITAL DOCUSIGN INTEGRATION

With this integration, users can open documents from Laserfiche, place recipient specific tags (such as signature/initial boxes) in documents and email them out. Recipients will be notified of the signature requirements via email - and once the document is signed and emailed back, both sent and signed documents will then automatically be archived in Laserfiche, with appropriate metadata applied. Users are able to:

- Open documents in the DocuSign® editor from Laserfiche
- Send documents to one person or to multiple recipients.
- Have returned, signed documents automatically archived in Laserfiche®, linked to and stored in the same location with the original document.
- Easily incorporate signature processes as part of an internal process/workflow.
- Request Signatures using the DocuSign® Activity Workflow.
- Drag activity into the designer and configure properties the same way users would use other Workflow Activities.

ASSUMPTIONS

- Client is responsible for providing their own DocuSign license, Public IP, SSL/TLS certificate and DocuSign “Connector” Feature. Client must have TLS 1.2 configured on all Laserfiche servers.

LASERFICHE POWERPACK BY MCCi

MCCi’s PowerPack for Laserfiche is a robust suite of add-on features for Laserfiche, built by MCCi’s development team. The PowerPack enhances Client’s Laserfiche experience and adds additional functionality to include:

- Scheduling server-side OCR jobs without the need for advanced Laserfiche modules.
- Scraping, automatically, an email inbox to pull emails in to Laserfiche, for archival purposes or to kickoff Business Process Automations.
- Utilizing custom workflow activities, such as the ability to do server-side generation of Laserfiche Images from PDFs.

These features and many others are available with Client’s PowerPack subscription, and new features are added regularly. Client’s implementation Project Manager will consult with Client on the add-ons available and discuss which features make sense to install and configure within the scope of Client’s current project, as well as for near-term additional projects. Client’s Project Manager will install and configure the PowerPack features that are immediately useful to Client’s current Laserfiche needs.

ANALYTICS DASHBOARD & REPORTING

PowerPack’s Analytics Dashboard allows Client to have a better understanding of Client’s Laserfiche system content. An easy-to-use central dashboard lets Client see useful information about Client’s repositories such as number and size of Client’s documents, who is creating the most content, where Client has duplicates, and much more. It identifies:

- Dashboard & drilldown reports
- Document types, counts, and size.
- Volume size and document counts.
- Documents created by user.
- Duplicates.

OCR (OPTICAL CHARACTER RECOGNITION) SCHEDULER

A simple, effective, and efficient way to mass OCR documents in Laserfiche. It allows administrators to configure multiple OCR sessions and ensure OCR is being completed, without end user interaction.

- This is an installed application, generally on a server, that runs as a service that schedules a user to log in to the repository and extract text from documents in a specified folder.

CUSTOM WORKFLOW ACTIVITIES

MCCi has built custom workflow activities to extend the power of the workflow module. Once installed, these activities look the same as the workflow activities that come with Laserfiche but give Client advanced capabilities that Laserfiche does not currently provide. Examples include:

- **PDF TO TIFF**
This activity takes a PDF document within Laserfiche and creates a new TIFF image from it. By combining with other existing workflow activities, users can dynamically choose the input and output path of these documents and merge these documents together while copying metadata and security settings.
- **EMAIL ARCHIVAL**
This is a set of email-related activities that give workflow the ability to connect to a single email account and perform a variety of functions. Get email counts, store email attachments, store full email, use email data to trigger workflows actions or apply to templates, and more.
- **SET OF 7 WORKFLOW ACTIVITIES:**

1. **Create E-Mail Connection:** Activity that sets up an IMAP connection for an email address. The connection can then be used in other PowerPack E-Mail activities.
2. **Retrieve E-Mail List:** Activity retrieves a list of email identifiers for the account specified in the IMAP Connection field
3. **Retrieve Single E-Mail:** Activity gets information about an IMAP E-Mail message item
4. **Store E-Mail:** Activity downloads an email in a *.eml format to the Laserfiche Repository
5. **Retrieve E-Mail Attachment:** Activity that retrieves information about an E-Mail attachment
6. **Store Attachment:** Activity that downloads an attachment from a specified IMAP account given an E-Mail ID and Attachment ID
7. **Mark Mail Message:** Activity sets whether an IMAP message is marked as read or unread and can also move the email to a subfolder in the email inbox

LASERFICHE NEOGOV INTEGRATION BY MCCi

The MCCi Integration between Laserfiche and NEOGOV is a powerful tool that enables Personnel Records created in NEOGOV to be transferred seamlessly to a Laserfiche repository. To transfer records from NEOGOV to Laserfiche, users select the Applications or Onboarding documents they want to transfer, then simply click a "Send to Laserfiche" button in the NEOGOV interface.

The integration utilizes Restful Web Service APIs to automatically "upload" Client's NEOGOV documents from Client's cloud based NEOGOV implementation to Client's Laserfiche repository, regardless of where the repository is located. To facilitate this transfer, this integration includes a configuration utility and Restful Web Service Endpoint that must be installed near Client's Laserfiche environment. This endpoint must be able to reach Client's Laserfiche server to store the record, while also being accessible over the public internet for the NEOGOV service to send the records to Client's environment.

The Laserfiche NEOGOV integration currently works with the NEOGOV Insight and Onboard modules.

CLIENT REQUIREMENTS

- Client must have the NEOGOV Insight and/or Onboarding module(s) to make use of this integration.
- Client must have a named user license allocated for this integration to use for uploading records.
- Client must give MCCi access to Client's Laserfiche environment to install MCCi's Common Web Service Endpoint.
- The listener Endpoint must be on a server that can be accessed by the NEOGOV Document Management Service and is often deployed to Client's DMZ environment.
- This listener service must be able to transfer received documents to Client's Laserfiche server over port 80 or 443.
- Client must separately procure and install their own SSL/TLS Certificates to bind to IIS HTTPS endpoints, enabling encrypted transmission of HR documents from NEOGOV to Laserfiche.

MCCi COMMON WEB SERVICE API FOR LASERFICHE

The MCCi Common Web Service API (CWSAPI) for Laserfiche is a restful web service integration API built by MCCi on top of the Laserfiche Software Development Kit. The services allow for basic document creation, deletion, modification, and retrieval using JSON-formatted restful calls, initiated from external applications. Use of the CWSAPI requires appropriate user licensing through named users or a keyed integrator license purchase through Laserfiche.

GOFICHE SUITE FOR AVANTE/RIO/SUBSCRIPTION

The GoFiche Integration Suite is a unique set of integration tools, offered exclusively by MCCi. Features include:

- GL look-up and GL coding
- GL Site Distribution within Laserfiche

- Processed invoice data uploads with audit reports
- Invoice review and approval process via Laserfiche Forms interface
- Ability to utilize Laserfiche Web client for integration capabilities

REQUIREMENTS

- Laserfiche 10.4.x or higher
- One dedicated Laserfiche Avante/RIO/Subscription Full User License
- Laserfiche Forms Professional Licensing; Licensing is required for all users that client intend to use
- Note that GoFICHE is not currently available for Laserfiche Cloud.

2. PRODUCTS AND SERVICES

2.1 DISCOVERY.

DISCOVERY/ASSESSMENT OF EXISTING RECORDS, SYSTEM, AND POLICIES/PROCEDURES SHALL INCLUDE DISCOVERY/ASSESSMENT SESSIONS IN ORDER TO DEVELOP A DETAILED ASSESSMENT AND STRATEGIC ROADMAP FOR A COMPREHENSIVE RECORDS MANAGEMENT PROGRAM.

MCCi's team will work alongside the Client's Records Manager and participating departments to conduct discovery and requirements gathering sessions. Together they will plan out the repository structure including metadata, templates, record series, and folder structure that will be implemented. The objective of requirements gathering meetings is to help lay out the metadata guidelines and retention requirements for each identified document type that will be stored in Laserfiche. Artifacts, including the Document Type Matrix, created during this process will be utilized to build the repository structure according to Laserfiche Best Practices for Records Management. The Document Type Matrix provides a standardized method for MCCi to collect document types, create appropriate and consistent naming conventions, a logical folder path, and metadata fields to support each of these requirements. Based on discovery sessions, an MCCi System Engineer will create templates, Record Series, and accommodations for Transparent Records Management. All records series will be set to follow the retention schedules provided and approved by the Client based on discovery.

2.2 TASKS.

A. ON-SITE ASSESSMENT/DISCOVERY INTERVIEW SESSIONS, WITH TEAMS FROM PARTICIPATING AGENCY'S DEPARTMENTS/DIVISIONS, TO IDENTIFY RECORD REPOSITORIES AND PROCESSES THAT RESULT IN THE GENERATION OF RECORDS FROM THE FOLLOWING DEPARTMENTS.

During the requirements gathering\discovery phase of the project, MCCi can come onsite to interview staff from each of the departments that will use Laserfiche. It is best to have people from multiple "roles" attend these sessions to provide a well-rounded and detailed description of all documents and systems used, as well as business processes and challenges currently experienced with the existing practices. We will seek to have a comprehensive understanding of the way business is currently done and several details about all documents involved. We will seek to understand the full document life cycle (how it gets created, how it is used/retrieved, retention requirements, metadata\indexing requirements, workflow requirements, and access\security requirements). We will compile this collected information into a document matrix that will be used as a blueprint for configuring the system.

MCCi will use this discovery process to identify both short-term objectives that will be implemented as part of the initial roll-out, and longer-term opportunities to leverage Laserfiche for further improvements in the future. MCCi's Project Team will work alongside the Client's Records Manager as well as participating departments to conduct discovery and requirements gathering sessions to plan out the repository structure including metadata, templates, record series, and folder structure that will be implemented. The objective of requirements gathering meetings is to help lay out the metadata guidelines and retention requirements for each identified document type that will be stored in Laserfiche. Based on this information, additional filing workflows may be created depending on the established scope of the project. Additionally, the document types identified in the Document Matrix may fit in to some workflow or business process and the requirements for that process will be established or further clarified.

B. ASSESS CURRENT RECORDS REQUIREMENTS BY THE PARTICIPATING AGENCY AND TYPES OF RECORDS GENERATED (E.G., DATA, DOCUMENTS, MESSAGES, HARDCOPIES, ELECTRONIC/SOFT COPIES, ETC.)

Before implementing an enterprise-wide Electronic Records Management system, it is important for a Records Program and Records Policies to be in place. MCCi's Records Management Consulting service focuses on revision and/or creation of such programs and policies. The assigned MCCi Project Team will perform consultations, including a review of current document organization and retrieval practices to determine desired indexing

methods, security rules, and other basic system set up needs. Once this information has been gathered and provided to the MCCi Project Manager, the basic folder structure, document naming conventions, and template set-up will be configured according to the client's needs.

Areas of review include:

- Review of current data structure (folder structure, indexing, etc.)
- Security review
- Current paper/electronic Forms review
- Interviews with departments not using Laserfiche Integration/Mobile Access Needs

C. SYSTEMS UTILIZED TO STORE RECORDS FOR BOTH CURRENT AND LEGACY DOCUMENTS.

During discovery and assessment, the MCCi Project Team will focus on accessibility through imaging and indexing historical non-active records and active records. MCCi will work to help eliminate paper processes and maintain the day-forward active digital records. It is important to lay this foundation up front so that all records (both day-forward and legacy) will maintain a consistent filing system throughout the implementation.

D. CURRENT TAXONOMY AND METADATA IMPLEMENTED.

MCCi will conduct discovery and review of existing client processes and documents. Through requirements gathering meetings, MCCi will actively consult with client stakeholders to develop the taxonomy for metadata, templates, record series, and folder structure that will be implemented in Laserfiche.

E. EXISTING DATA INVENTORY SYSTEMS FROM OFFSITE RECORD STORAGE PROVIDERS.

Any offsite content that was previously captured would be available for review. Similar to managing records stored on network file shares, Laserfiche can manage the retention of records whether the actual document for that record is stored in Laserfiche or in another location (digital or physical). The physical records will be represented as Laserfiche record folders, using specific metadata items to specify the actual external location of the record (warehouse, shelf, box, cabinet, drawer, etc.).

F. SYSTEMS UTILIZED TO STORE RECORDS FOR BOTH CURRENT AND LEGACY DOCUMENTS.

See response to 2.2.C above

G. EVALUATION OF ADHERENCE TO THE CURRENT RETENTION SCHEDULE/RECORD DESTRUCTION POLICY - IDENTIFICATION AND EVALUATION OF RECORDS GENERATED (HARD COPY AND/OR ELECTRONIC) - APPLICABLE FEDERAL, STATE, AND LOCAL LAWS/REGULATIONS.

Records management is vital to the success of any organization. An electronic records management system that has been certified to meet stringent requirements for both organizing file structures and plans (DoD 5015.2) and reliably preserving data for years to come (VERS) is essential to keeping your information assets organized, safe and secure.

DOD 5015.2 - DoD 5015.2 outlines the baseline functionality required for records management applications used by the U.S. Department of Defense and has been endorsed by the National Archives and Records Administration (NARA) as an "adequate and appropriate basis for addressing the basic challenges of managing records in the automated environment that increasingly characterizes the creation and use of records." **Laserfiche Records Management has been DoD 5015.2 certified for over 10 years** (now on version 3), unlike many of the solutions on the market.

- **VERS** - Laserfiche's powerful features safeguard records and ensure long-term data preservation with a standard format that meets Victorian Electronic Record Strategy (VERS) V2 requirements.
- **Regulatory Compliance** - Laserfiche Records Management also enables regulatory compliance with regulatory mandates such as SEC, FINRA, FOIA, HIPAA and more.

- **Combination of all the above:** Laserfiche Records Management is a system that has achieved full compliance with both VERS and DoD 5015.2. It is guaranteed to provide a multi-faceted set of information governance tools that manage document lifecycle from initial capture to long-term archival. These tools will break down information silos will ensure that information is accessed in a prudent and compliant way.

H. CURRENT SYSTEM USED FOR RECORD STORAGE (CURRENT AND ARCHIVED).

Similar to managing records stored on network file shares, Laserfiche can manage the retention of records, whether the actual document for that record is stored in Laserfiche or in another location (digital or physical). The physical records will be represented as Laserfiche record folders, using specific metadata items to specify the actual external location of the record (warehouse, shelf, box, cabinet, drawer, etc.).

Laserfiche metadata will be used to manage the location property of all physical records managed by Laserfiche. By managing these records using Laserfiche, retention reports can include records stored both in Laserfiche and in physical files. For instance, users will be able to query the system by cabinet ID and drawer number and get an inventory report of the record contents of that drawer. Additional metadata can be added to Laserfiche to enable further management and reporting on physical space for records.

Laserfiche allows for the creation of virtually unlimited metadata fields that can be used to manage/track files/boxes in any location. One example is "Record Size". Many organizations require specific reporting on the volume of records they intend to destroy or have destroyed. Prior to digital records management, many organizations supply this information in terms of linear inches of paper records (or some other physical unit of measure). With the transition to digital records management, many organizations are now reporting this value in terms of bytes, kb, mb, or gb being destroyed. This digital file size is already available in Laserfiche for files stored in Laserfiche. For physical files, custom metadata fields can be used for users to enter the physical size when they enter the record in the system. Thus, when generating disposition reports, Laserfiche can calculate and report on the total size of the physical records being destroyed.

I. AREAS OF POTENTIAL RECORD DUPLICATION

Since documents stored in Laserfiche include multiple components (image/file content and metadata), duplicates can exist in multiple contexts. If the business rules define a duplicate as two documents containing identical metadata, then workflow rules can be established to check for this scenario at the time of capture or when metadata is updated. If a duplicate is identified, it can be tagged indicating it is a potential duplicate, allowing a user to decide to remove it, create the document as a new version, etc. If the file content is the same, MCCi's PowerPack component includes features for identifying duplicates based on the checksum of the image content. Additionally, Laserfiche provides a Transparent Records Management views, that is part of our DoD certification. It allows for a Record Manager view based on retention of the records and a user-friendly view of the documents based on the content of the document. Using shortcuts and Workflow, this can be setup and is part of our Best Practices approach for designing the system.

2.3 SYSTEM CAPABILITY

A. BE COMPATIBLE WITH ALL MODERN WEB BROWSERS (EDGE, FIREFOX, CHROME, SAFARI, ETC.)

Edge, Chrome, Firefox, and Safari are recommended and supported.

B. UTILIZE A MOBILE-FRIENDLY, RESPONSIVE DESIGN THAT IS COMPATIBLE ON IOS AND ANDROID MOBILE DEVICES

Laserfiche has all functionality from a mobile device via the Web Client or Mobile App except for certain integration points, most notably the Microsoft Office Integration. Custom integrations built for the desktop application or Web Client may behave differently on a Mobile device. The Mobile App camera utility will also not have all the same functionality as the Desktop Scanning interface, though it has most of the same functionality. The Laserfiche Mobile App is available in the app store for Windows, Android, and iOS.

C. ALLOW PARTICIPATING AGENCY SYSTEM ADMINISTRATOR TO CONFIGURE ROLE-BASED PERMISSIONS AND INDIVIDUAL USER PERMISSIONS.

The Laserfiche Server provides a powerful set of security options the Client can use to ensure only the right users can access information in their repository. With Laserfiche security, the Client can control access on a variety of levels. The Client can determine which users can log in to their repository, collect them into groups to apply security consistently, and decide what folders, documents, and metadata they can see. In addition, Laserfiche gives users the tools they need to quickly apply security to very large or complicated systems.

Laserfiche security has two separate but interrelated aspects: authentication and authorization. Authentication determines users are who they claim to be; it answers the questions "who is this user?" and "can this user log in?" Authorization determines what elements of the repository the user can access after logging in and what they can do with those elements.

Laserfiche provides an extremely robust security system. The security can be broken down into main security types, Access Rights and Feature Rights.

Access Rights

Access rights control what actions users can perform on specific elements of the repository. Each operation on a document, folder, page, volume, field, or template has a set of required entry access rights. If the user attempting the action does not have the necessary rights, the user is denied the operation.

Access rights can be further broken down based on the type of element being secured:

- Entry Access Rights: Access to documents, folders, and shortcuts.
- Volume Access Rights: Access to volumes, including the ability to create and delete documents stored in that volume, and add, remove, or move pages that belong to the volume.
- Field Access Rights: Access to field data.
- Template Access Rights: Access to template definitions.

Feature Rights

Feature rights allow a user to perform specific actions, such as scanning and printing. Specifically, these rights control whether the command in question is available to that user when they open the Laserfiche web or Windows client. Feature rights are a quick way to prevent users from performing basic types of activity in Laserfiche.

Specific feature rights include:

- Scan: The ability to scan into a new or existing document.
- Import: The ability to import files into the repository.
- Search: The ability to perform any type of search.
- Print: The ability to print information from the repository.
- Export: The ability to export images, text, briefcases, folder list contents, listings of search results, and electronic files, and to use the Email Plug-in.
- Edit Text: The ability to modify the text associated with a document.
- Move Entry: The ability to move documents, electronic documents, and folders to a different folder, as well as the ability to move pages between documents.
- Process: The ability to OCR image pages, index documents, extract text from an electronic file, or process electronic documents using Laserfiche Snapshot. This feature right does not affect whether you can print an electronic file using Laserfiche Snapshot.
- Extended Properties: The ability to view additional property information in the Properties dialog box, as well as the ability to view the Entry ID folder browser column.
- Delete: The ability to delete entries, as well as whether one or more pages can be deleted from a document.

D. ALLOW USERS TO ENTER SEARCH PARAMETERS TO LOCATE DOCUMENTS BY REFERENCE NUMBER, APPLICATION NAME, DOCUMENT TYPE, DATE RECEIVED, SITE ADDRESS AND OTHER ENTERED ATTRIBUTES.

Users can use keyword searches and metadata searches on any field such as reference number, application name, etc. Users are also able to configure their own search parameters to enable searching by text and metadata fields searches such as reference number, date received, etc.

Laserfiche has a robust search engine.

Basic: The Basic Search is a general search allowing you to search text, entry names, fields, annotations, or a combination of these. The Basic Search acts like the Quick Search.

Business Process: Users can search for entries associated with a business process by searching for the business process's name, status, and start or completion date.

Date: Users can search for documents or folders by creation date and/or last modified date.

Digital Signatures: Users can search for documents by whether they have digital signatures associated with them.

Electronic Document: Users can search for documents by whether they have an electronic file associated with them—also considered searching for an electronic document—as well as what kind of electronic file.

Entry Name or Entry ID: Users can search for a specific document, folder, or shortcut using that entry's name or unique identification number (entry ID).

Field/Templates: Users can search for documents and folders by assigned template, independent field, field value, or multiple field values.

Links: Users can search for documents that have been linked together by specifying the relationship between them or by Link Group comment.

Pages: Users can search for documents by whether they contain image or text pages or by whether OCR processing has been applied to the images associated with that document.

Records Management: Users can also perform records management searches. These searches allow records managers to quickly locate records that need to be reviewed or processed.

Tags: Users can search for documents that have been assigned tags, or have specific tag comments, by specifying one or more informational or security tags.

Text: A text search lets users search for a word or phrase and provides more nuanced options than in Quick Search or Basic Search.

User: Users can search for all documents and folders that have been created, checked out, owned or last modified by a particular user.

Versions: Users can search for versioned documents by version comments, by the user who created a version within the document, by the date a version was created, or by version label.

Within Folder: Users can search the contents of the current folder or specify one or more folders to include or exclude from the search.

Within Volume: A search can be performed for all documents and electronic documents stored on a particular volume.

Additionally, the Text search enables users to search through the text of a document for a word or phrase. This is called a "full-text" search.

There are two types of full-text searches: basic text searches, the simplest way to perform a search, where users enter information into fields and boxes; and advanced text searches, where users type in a complex search string, which gives them more searching flexibility such as the following:

- **Phrase:** Allows users to search for a single word or phrase.
- **And:** Allows users to search for all documents that contain two specified words or phrases. Use the second text box that appears when selecting "and" to enter a second word or phrase.

- **Or:** Allows users to search for all documents that contain one of two specified words or phrases. Use the second text box that appears when selecting "or" to enter a second word or phrase.
- **Not:** Allows users to search for all documents that contain the first specified word or phrase, but not the second one (in the second text box).
- **Within:** Allows users to search for all documents that contain both specified words or phrases within a particular number of words of each other.

All text searches support the Fuzzy search option, which allows users to find all words or phrases that are similar to the word or phrase they typed, even if they contain misspellings or OCR errors.

When using the Fuzzy search feature, the degree of accuracy is determined by the number of letters or by the percentage of each word in the phrase. Specify the maximum number of letters that each word in the phrase can differ from the specified criteria and still be considered a good result or specify the percentage of each word in the phrase that can differ from the search criteria and still be considered a good result.

E. ALLOW PARTICIPATING AGENCY APPLICATION ADMINISTRATOR TO CONFIGURE NEW FOLDERS, SUB-FOLDERS, DOCUMENT ATTRIBUTES, AND DOCUMENT TYPES WITHOUT CONTRACTOR'S ASSISTANCE. ADMINISTRATOR CAN SELECT WHETHER CONFIDENTIAL FOLDERS ARE VISIBLE IN THE CUSTOMER-FACING INTERFACE.

The Laserfiche System Administrator can configure all folders in the Laserfiche repository and apply security to these folders without vendor assistance. Administrator can select whether confidential folders are visible in the customer-facing interface.

F. ALLOW USERS TO CONFIGURE THEIR OWN SEARCH PARAMETERS TO ENABLE SEARCHING BY A VARIETY OF ATTRIBUTES, FOR EXAMPLE: REFERENCE NUMBER, DATE RECEIVED, AND DOCUMENT TYPE.

Users can configure their own search parameters to enable searching by text and metadata field searches such as reference number, date received, etc.

G. HAVE OPTIONS FOR ONSITE, CLOUD-BASED STORAGE AND HYBRID-BASED STORAGE

MCCi offers an on-prem (self-hosted) or cloud hosted solution. MCCi's Managed Cloud platform provides a SaaS user experience with the functionality, access, and dedicated resources an on-prem solution would offer. Our Managed Cloud solution provides a single tenant architecture with the security, dependability, scalability, and customization needed for high-volume and highly integrated business process automation.

H. ALLOW PARTICIPATING AGENCY TO RETAIN OWNERSHIP OF THE DATA STORED ON THE PLATFORM AND THE ABILITY TO EXTRACT IT IN FULL AT ANY TIME.

Client will own their own data in Laserfiche with the ability to extract at any time.

I. ALLOW THE DIRECT IMPORT OF COMMON ELECTRONIC DOCUMENT TYPES (SUCH AS, BUT NOT LIMITED TO: TIF, PDF, JPG, MICROSOFT OFFICE STANDARD FORMATS SUCH AS DOCX AND XLSX).

Yes, Laserfiche can direct import virtually any type of file. This includes common image formats such as TIFF, PDF, JPG, along with MS Office files. Laserfiche can also store multimedia files such as audio and video file formats. When a user opens a non-image file, it will open using the application associated with that filetype on the user's computer.

J. BE EASY TO NAVIGATE, USER-FRIENDLY USER INTERFACE.

As a solution, Laserfiche consistently receives high marks from industry-leading independent studies related specifically to its ease of use and user adoption. All modules of Laserfiche are designed with ease of use in mind. The user interfaces and administrative tools are very easy to learn, navigate and use. Users will find that Laserfiche has a folder tree structure similar to Windows Explorer for easy viewing and use. This familiarity will give the Client's staff the confidence to begin scanning and retrieving documents almost immediately after installation making deployment easier on their resources.

K. ALLOW FOR ADD-ON FOR MICROSOFT OFFICE INTEGRATION TO ENABLE IMPORT OF EMAILS DIRECTLY INTO SYSTEM.

Laserfiche is tightly integrated with the Microsoft Office Suite, giving Clients the capability to easily archive records from an Office application directly to Laserfiche easily- including Microsoft Outlook. Users can drag and drop emails from Outlook and import this metadata into Laserfiche allowing for easy search. Additionally, basic e-mail information such as sender, recipient, date/time sent, etc., can be stored as field information for the electronic document created for the e-mail message. Attachments can be filed as well. The process of importing an e-mail message into Laserfiche is slightly different than that of importing other electronic files, namely because of how attachments and properties are handled. An e-mail message can contain one or more attachments. Laserfiche allows you to configure how those attachments are imported with the following options:

- Keep attachments with the e-mail message
- File each attachment as its own electronic file
- Keep attachments with the e-mail message and file each as separate document
- Do not import the attachments

L. ALLOW FOR FILES CAN BE UPLOADED BY USING A DRAG-AND-DROP SYSTEM.

Yes, Laserfiche allows for simple drag and drop import.

M. ALLOW APPLICATION ADMINISTRATOR TO UPLOAD DOCUMENT TEMPLATES FOR USE BY USERS.

Yes, the Application administrator can create and upload document templates for different types of users as needed.

N. ENABLES STORAGE OF APPLICATION PRESENTATION DOCUMENTS, SUCH AS POWERPOINT FILES, PHOTOGRAPHS AND VIDEOS

Yes, Laserfiche can store PowerPoint presentations and multimedia files such as audio and video file formats. When a user opens a non-image file, it will open using the application associated with that file type on the user's computer.

O. IDENTIFY DUPLICATE DOCUMENTS WITHIN A FOLDER

Yes, out of the box, duplicates are easily recognizable. Laserfiche also offers version control.

2.5 CUSTOMER FACING INTERFACE.

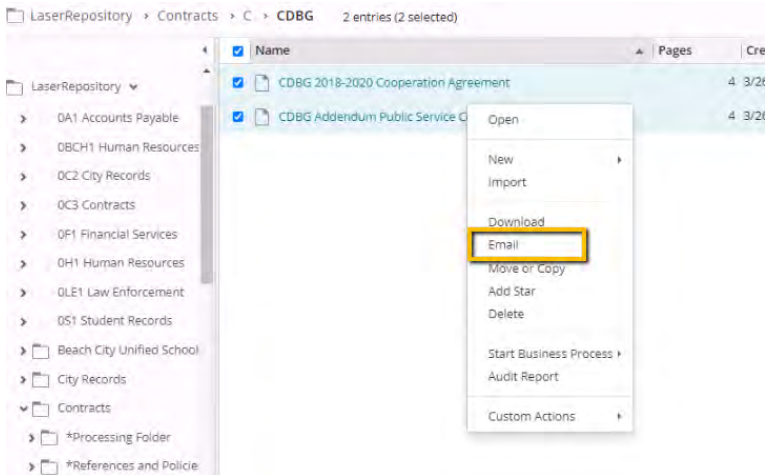
A. INCLUDE A COUNT OF THE TOTAL NUMBER OF DOCUMENTS IN A FOLDER,

Yes, while in a particular folder, Laserfiche shows the total number of documents.

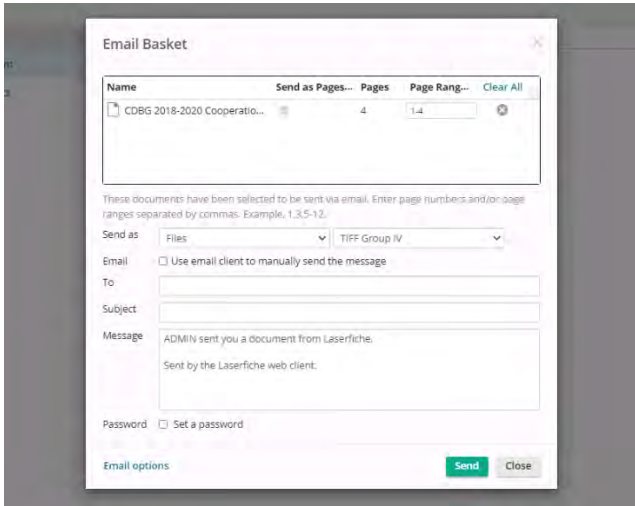
B. ENABLE THE DOWNLOADING AND PRINTING OF DOCUMENTS,

Laserfiche allows users to right-click on a document(s) to email directly from the application (See Screenshot 1). From here a dialog box will appear to allow for whole document or pages along with the ability to send as link or copy, file type, and to set a password (See screenshot 2). Printing can be done from the application, as well, (see screenshot 3) and users are given the ability to print all document(s) or just selected pages. Note, these can all be done from the document viewer as well.

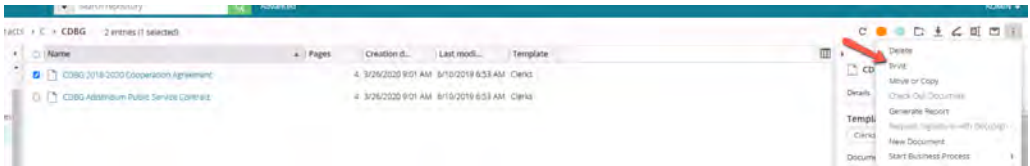
Screenshot 1:



Screenshot 2:



Screenshot 3:



C. ALLOW ADMINISTRATOR TO REDACT SECTIONS OF DOCUMENTS FROM PUBLIC VIEW IF NEEDED. PRINTED AND DOWNLOADED DOCUMENTS INCLUDE THE REDACTION IN THE DOWNLOADED VERSION,

Yes, redaction capability is standard in Laserfiche. Images and/or text associated with a document can be redacted, allowing users to hide sensitive material from unauthorized users. Only users with sufficient security rights can view redacted material, which will appear highlighted in gray. Users without security rights will see a black or white area, instead of the image or text behind it. Users with appropriate security rights can choose whether to allow the sensitive material to be visible after exporting/printing via the Settings dialog box.

D. ABILITY TO GENERATE HYPERLINKS TO SPECIFIC DOCUMENTS WITHIN THE SYSTEM TO ALLOW THESE TO BE USED IN REPORTS, EMAILS, ETC,

Yes, with Laserfiche users can Direct Share specific documents with people for a specific timeframe. Links to the record can be included in internal email notifications.

E. ABILITY TO SELECT DIFFERENT LANGUAGES AND/OR PHOTOS WITHIN THE INTERFACE,

The Laserfiche web client is available in English, Spanish, French, Portuguese (Brazilian), Arabic, Simplified Chinese, Traditional Chinese, Italian, and Thai. Laserfiche Forms is available in English, Spanish, French, Portuguese (Brazilian), Arabic, Simplified Chinese, Traditional Chinese, and Thai.

F. ADA COMPLIANT INTERFACE,

Yes, the Laserfiche Web Client is compliant, please refer to this link for further detail and VPAT for full compliance documentation - <https://www.laserfiche.com/legal/accessibility>

G. AT-A-GLANCE STATUS OF APPLICATIONS BASED ON INPUT META-DATA (I.E META-DATA AND ATTRIBUTES CAN BE ADDED TO APPLICATION FOLDERS IN ADDITION TO DOCUMENTS WITHIN FOLDERS TO ENABLE APPLICATION STATUS TO BE PUBLISHED/SUMMARIZED VIA A PAGE ON THE PARTICIPATING AGENCY'S WEBSITE.

Yes, reporting on Laserfiche metadata is very quick and simple. This data can then be used for reporting and enabling the status to be posted/published as needed on the Agency website.

2.6 REPORTING AND MANAGEMENT.

A. SYSTEM GENERATES REPORTS OF NUMBER OF DOCUMENTS ACCESSED, IMPORTED, UPLOADED, EDITED AND DELETED. RESULTS CAN BE REFINED BY USER.

Laserfiche Audit Trail enables the Client to track activities performed in a Laserfiche repository. The tracked information is stored in log files that Audit Trail uses to generate reports. Combined with other aspects of the Laserfiche system, auditing not only helps to show compliance with legal regulations but also contributes to the security of the Laserfiche repository.

How Does Audit Trail Work?

Laserfiche Audit Trail records events that take place in a Laserfiche repository enabling the Client to view those events as part of a report.

The first and most important reason to use Laserfiche Audit Trail is to keep track of what occurs in a Laserfiche repository. Before Laserfiche activity can be audited, a privileged user must choose the types of repository activity that will be logged. After this configuration has been performed, an event will be recorded in the audit log when a user performs an action that requires auditing. The Laserfiche Server will store these audited events in a binary log file.

The second purpose of Laserfiche Audit Trail reporting: filtering and organizing audited repository activity. Once the Client has enabled auditing in their repository, they can generate reports to analyze their repository activity using the Laserfiche Audit Trail Reporting application. This application interprets the binary log files and allows the Client to run reports on their contents, filtering by a variety of criteria.

OpenLaserfiche Server

Configure the Laserfiche Server to track events that should be logged. This process may differ depending on the edition of Audit Trail the Client has installed.

OpenAudit Log

Once configured, the actions performed in the repository (that have been configured to be logged) are recorded to a series of Audit log files.

OpenAudit Trail Reporting

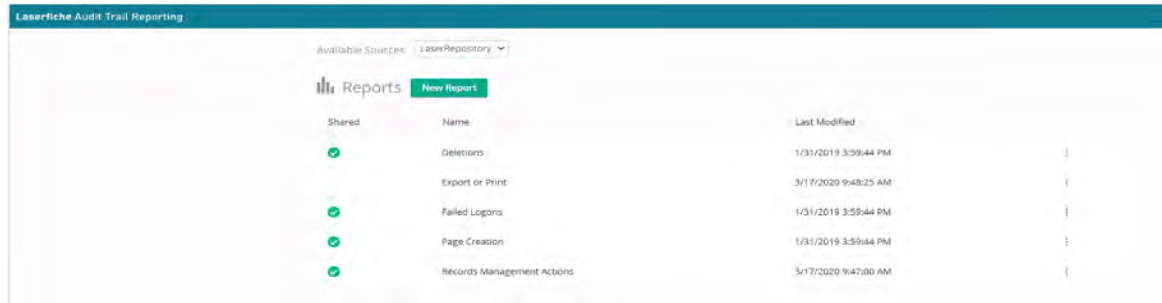
Using the Laserfiche Audit Trail Reporting application, the Client can define a date range (as well as other settings) for the data they want to run reports on. For example, they might want to run a report on actions performed in their repository for the past 30 days.

Open SQL/Oracle Database

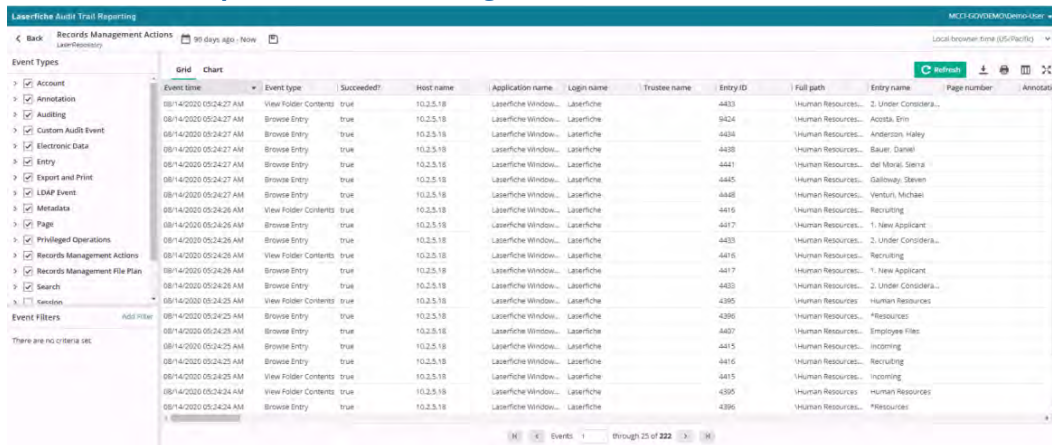
Once this date range is defined, the data is pulled from the Audit log and placed into the Client's SQL or Oracle database. This database is separate from the database the Client's repository uses, which prevents the audit reporter from affecting repository performance. This enables the Client to run reports more efficiently since they are sifting through significantly less but more relevant information.

Audit Trail offers a web-based viewer to view all audit information, along with the ability to save report definitions. Below are two screenshots of the interface.

Screenshot 1 - Saved Reports and Ability to Create New



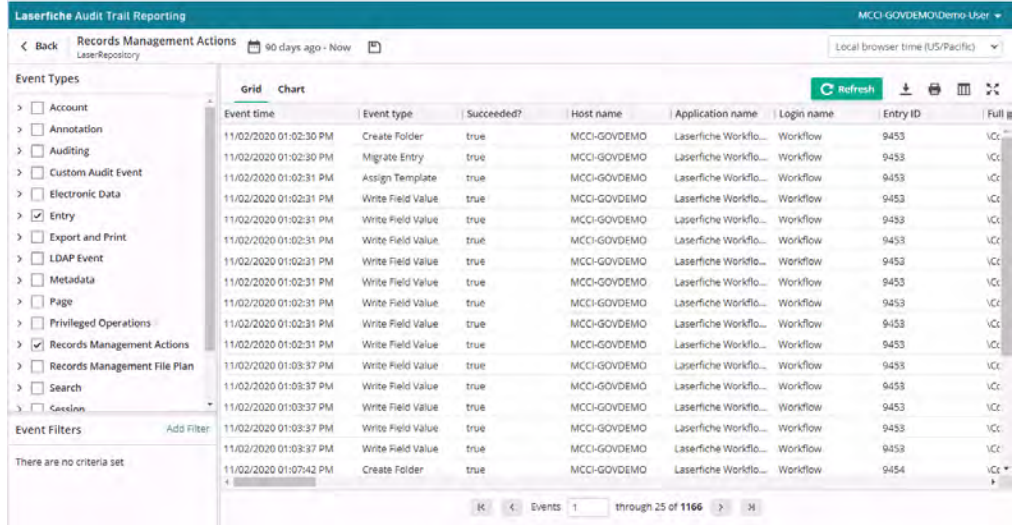
Screenshot 2 - Report Creation/Viewing interface



B. SYSTEM COLLECTS INFORMATION ON WHEN DOCUMENTS ARE ACCESSED/ VIEWED/ MODIFIED AND DOWNLOADED.

Laserfiche, Audit Trail enables the Client to track activities performed in a Laserfiche repository. The tracked information is stored in log files that Audit Trail uses to generate reports. Combined with other aspects of the Laserfiche system, auditing not only helps to show compliance with legal regulations but also contributes to the security of the Laserfiche repository.

Screenshot - Audit Trail Web Interface



C. SYSTEM CAN GENERATE REPORTS ON TOTAL SIZE OF ALL DATA STORED IN THE SYSTEM AND, DEPENDING ON WHETHER SYSTEM IS CLOUD-BASED, WHERE DATA IS BEING STORED.

Through the administrator settings in the Laserfiche system data can be reviewed in the following ways:

Repository Properties

The Repository Properties page provides the Client with additional information about their repository.

Locking Status

The Locking Status section displays whether the repository is locked and allows users to lock or unlock it using the Lock or Unlock button.

Indexing Status

In the Indexing Status section, users can see the current status of the Laserfiche Full-Text Indexing and Search service. Users can also pause indexing, clear the index queue, add an indexing task, or refresh to update the status.

Statistics

In the Statistics section, the Client can review information about your repository.

Current Size: The total size of the repository and its contents.

Document Count: The total number of documents in the repository.

Image Count: The total number of TIFF images contained within documents in the repository.

Full-featured connections: The number of full-featured license connections currently made to the repository.

Retrieval connections: The number of read-only license connections currently made to the repository.

Logical volumes: The number of logical volumes attached to the repository.

Physical volumes: The number of physical volumes attached to the repository.

Disk Space Usage: The Client can calculate the disk space used by volumes currently attached to the Laserfiche repository. Note that this will only calculate disk space used by fixed volumes, not removable volumes.

To calculate disk space usage, click Check disk space usage. If there are many volumes, this calculation make take a few moments. In the Disk View tab, review the disks that host volumes on this repository, their locations, and the disk capacity and current disk usage for the volume disks. To view the volumes on a disk, click View volumes on this disk. In the Volume View tab, review the volumes currently attached to this repository, and their size and path, as well as the disk capacity and available disk space on the hard disks that host them.

This documentation is specific to Laserfiche version 11.

2.7 TESTING - THE CONTRACTOR SHALL COMPLETE ALL NECESSARY IMPLEMENTATION WORK IN A PROFESSIONAL MANNER THAT MEETS THE REQUIREMENTS OF THE PARTICIPATING AGENCY. THE CONTRACTOR SHALL ENSURE THAT SYSTEM IS CORRECTLY CONFIGURED TO MEET ALL PARTICIPATING AGENCY FUNCTIONAL REQUIREMENTS. CONTRACTOR SHALL COORDINATE FUNCTIONAL TESTING TO ENSURE ACCURACY OF CONFIGURATIONS. WORK SHALL COMMENCE WITHIN 45 DAYS OF CONTRACT AWARD.

MCCi will meet all necessary implementation requirements in a professional manner and ensure client satisfaction. For each product increment, testing will need to be conducted through alpha and beta testing. Alpha testing will be first conducted by MCCi through a two phased approach. First, the system engineer/developer will test the product increment under "alpha testing." Once the item is bug free, the MCCi project manager will conduct a second round of testing until bug free under "beta testing." Once bug free, MCCi will package a group of items for client for under user acceptance testing (UAT). Client will have a list of items in a "backlog for UAT." The item will be moved by section in basecamp by MCCi project manager and assigned to client. At this point, the client will be responsible for testing item before completion. If item is bug free, the client will simply need to close the item and notify MCCi project manager that item is bug free. If a bug exists, client should move the item under "identified bugs from testing/development" and report the item. Client should include details of the bug so corrective action can take place. MCCi and the client will go through same procedures once corrective action is taken until item is completely bug free.

2.8 TRAINING - THE CONTRACTOR SHALL PROVIDE RESOURCES EXPERIENCED WITH DEVELOPING AND EXECUTING TRAINING PLANS, INCLUDING CONTENT DEVELOPMENT AND DELIVERY, TO ASSIST THE PARTICIPATING AGENCY IN MEETING END-USER TRAINING NEEDS. IMPLEMENTATION SHALL OCCUR IN PHASES AND KNOWLEDGE TRANSFER SHALL BE AN ONGOING PROCESS THROUGHOUT THE ENTIRE PROJECT. THE CONTRACTOR SHALL PROVIDE KNOWLEDGE TRANSFER BOTH VERBALLY AND THROUGH WRITTEN DOCUMENTATION AND PROCEDURES

MCCi provides high quality professional services and support. Each member of our professional services team is trained thoroughly on the product and goes through the applicable manufacturer training based on their area of focus. MCCi works with our clients to put together a flexible training strategy to meet their individual needs throughout the project. MCCi can provide train-the-trainer training for key staff, which can then roll-out the project to the organization or MCCi can serve as the trainer for all users in the organization. Please see our Training Packages below for additional information. These packages are designed to be completed at various stages during the project as best determined during the sales discovery and project kick off assessment. In addition to scheduled training options, MCCi offers The Training Center for Laserfiche, an on-demand training resource subscription with hundreds of training videos and other resources available to the client at any time.

THE TRAINING CENTER FOR LASERFICHE

MCCi's Training Center for Laserfiche annual subscription provides an easy, cost-effective way for all users in Client's organization to access training videos for Laserfiche and ABBYY.

BENEFITS

- 24/7 access to on-demand Laserfiche training videos and other resources
- Reduction in training expenses
- Caters to all skill levels from Basic Users to Advanced System Administrators
- Unlimited access for Client's entire organization
- User determined schedule and pacing
- Reduction in internal support and increased user productivity
- Increased efficiency through improved internal usage/adoption
- Instant/budgeted training available in the case of employee turnover
- Enhance Client's organization's internal Laserfiche training program

**The Training Center subscription gate is based on Laserfiche user counts*

LASERFICHE REPOSITORY ADMINISTRATOR TRAINING

MCCI’s Repository Administrator Training is available as a single half-day session or a full day (two half-day sessions). The goal is for your organization to have a trained Repository Administrator. The single half-day session focuses on ongoing management of the repository with a focus on user management, troubleshooting user permissions, monitoring, and auditing user activity, and managing metadata. The full day includes ongoing management as well as considerations for future growth, focusing on setting up new security permissions, repository planning, creation of new metadata types, and more. The complete list of training topics is listed below.

- User Management
- Core User Security
- Supplemental User Security*
- Monitoring User Activity
- Metadata Management
- Repository Architecture Overview
- Web and Windows Clients Differences
- General Repository Settings
- Audit Trail (if purchased)
- Weblink Designer (if purchased)*
- Technical Support Overview
- Recycle Bin Settings

*Available for full day training only

CLIENT DELIVERABLES

- Have a license available for each attendee participating in the training
- Provide the requisite IT resources

MCCI DELIVERABLES

- Provide Repository Administration training according to the level of package purchased
- Provide training for up to six (6) users per session

Description	Basic	Full
Product Training	Laserfiche Web Management Laserfiche Administration Console Audit Trail (if purchased)	Laserfiche Web Management Laserfiche Administration Console Weblink Designer (if purchased) Audit Trail (if purchased)
Instructor-Led Sessions	1 session remote (3 hours total) or half day onsite	2 sessions remote (6 hours total) or 1 day onsite
Great For	Ongoing Management of the Repository	Ongoing Management of the Repository Future Growth of the Repository

LASERFICHE IT ADMINISTRATOR TRAINING (SELF-HOSTED)

MCCI’s IT Administrator Training is available as a standalone one-hour session for organizations that have a clear division in responsibilities between infrastructure, application support, and repository management. The IT Administrator may be responsible for server maintenance, backups, user licensing, and/or product installations on end-user workstations. The goal is to familiarize the IT administrator with an overview of the Laserfiche environment, repository architecture for backup purposes, user licensing, and installation files.

- Laserfiche Environment Overview
- Repository Architecture Overview
- Laserfiche Directory Server
- User and Application Licensing
- Volumes
- Installation Files
- Technical Support Overview

CLIENT DELIVERABLES

- Have a license available for each attendee participating in the training
- Provide the requisite IT resources

MCCI DELIVERABLES

- Provide Laserfiche IT Administration training according to the level of package purchased
- Provide training for up to six (6) users per session

USER TRAINING

MCCI's New User Training is a great introduction to the Laserfiche repository, which is accessed through an application called the Laserfiche Client. Attendees will become familiar with how to import new content, to search and retrieve existing content, and to export. Your organization can choose whether training is conducted on the web-based or on the Windows desktop Client.

BASIC

Your organization can work closely with the product trainer to identify user functions, customizing the training agenda on what attendees need to know for how they will use the repository. The trainer can emphasize certain topics and can eliminate or briefly describe others.

- Import Options
- Laserfiche Scanning
- Search and Retrieval
- Metadata Reports
- Dashboard (Laserfiche Cloud)
- Export Options
- Annotations Tools
- Templates & Fields
- OCR and Generating Text

ADVANCED

MCCI's Advanced User Training is a continued examination of features available in the Laserfiche Client. Your organization can work closely with the product trainer to emphasize certain topics and can eliminate or briefly describe others.

- Laserfiche Snapshot
- Microsoft Office Integration
- Advanced Search Syntax
- Version Control
- Tags
- Custom Quick Search
- User Options
- Repository Design Considerations

CLIENT DELIVERABLES

- Have a license available for each attendee participating in the training
- Provide the requisite IT resources

MCCI DELIVERABLES

- Provide Laserfiche User training according to the level of package purchased
- Provide training for up to six (6) users per session

Description	Basic	Full	Advanced
Product Training	Laserfiche Client	Laserfiche Client	Laserfiche Client
Instructor-Led Sessions	1 session remote (3 hours total) or half day onsite	2 sessions remote (6 hours total) or 1 day onsite	1 session remote (3 hours total) or half day onsite
Great For	Onboarding a Single Department New Users to Laserfiche	Train the Trainer Learning & Development Department	Seasoned Laserfiche Users

LASERFICHE RECORDS MANAGEMENT MODULE TRAINING

Client should have full knowledge of internal records management policies and have prior experience in records management. This training will be quoted for Clients with the Records Management functionality of Laserfiche.

RECORDS MANAGEMENT TRAINING

- Records Series
- Versioning
- Records Folders
- Security Tags
- Document Links
- Vital Records

- Cutoff Criteria
- Hold Period
- Final Disposition
- Event Dispositions
- Cutoff Eligibility
- Disposition Actions
- Interim Transfers
- Permanent Records
- Retention Period
- Time Dispositions
- Accession / Freezing
- Destruction

ADMIN CONSOLE SETUP

- Cycle Definitions Setup
- Locations Setup
- Retention Schedules Setup
- Cutoff Instructions Setup

CLIENT DELIVERABLES

- Have a license available for each attendee participating in the training
- Appoint a Records Management Administrator who has been through Laserfiche Administrator training to manage ongoing user and process permissions
- Provide the requisite IT resources

MCCI DELIVERABLES

- Provide Records Management training according to the level of package purchased.
- Provide training for up to six (6) users per session

Description	Level 1	Level 2	Level 3
Instructor-Led Sessions	2 sessions (6 hours total) or 1 day onsite	4 sessions (12 hours total) or 2 days onsite	4 sessions (12 hours total) or 2 days onsite
Laserfiche Workflow for Uniform Filing Training 2 sessions (6 hours) or 1 Day Onsite	Not Included	Included	Included
Remote Post Training Configuration Assistance	Not Included	Not Included	Included, up to 30 calendar days from the last training session, not to exceed 10 hours

PROCESS AUTOMATION DESIGNER TRAINING ON LASERFICHE FORMS

MCCI’s Laserfiche Forms Training is designed to be highly interactive. The goal is to quickly empower individuals in the Client’s organization to learn Laserfiche Forms. Individuals will learn not only how to create and maintain webforms but also apply their new skills to streamlining approval and review processes. Lastly, training is completed in the Client’s Laserfiche Forms environment, ensuring attendees have the right permissions to get started after training.

In Level 1, attendees are led through exercises designed to showcase commonly used features and tools within Laserfiche Forms.

In Level 2, attendees get all Level 1 and spend an extra session building a process custom to the Client’s organization. In one (1) 2-hour remote sessions prior to training, attendees are led through a process design workshop with the instructor to isolate and plan out a process. Attendees then apply their new skills during the last session to the outlined process.

In Level 3, attendees get all of Level 2 and are offered additional remote assistance post-training. This is especially useful if the identified process is complex, and attendees prefer more coaching beyond the Level 2 training session.

CLIENT DELIVERABLES

- Have a license available for each attendee participating in the training
- Appoint a Forms Configuration Administrator who has been through Laserfiche Administrator training to manage ongoing user and process permissions
- Provide the requisite IT resources
- Provide MCCi with a mapped-out narrative of specified business process sample forms, approval steps and approvers, metadata requirements, etc. (Level 2 and Level 3 only)

MCCI DELIVERABLES

- Provide Process Automation training according to the level of package purchased. CSS and JavaScript are outside the scope of this training package
- Provide training for up to (six) 6 users per session

Description	Level 1	Level 2	Level 3
Product Training	Laserfiche Forms	Laserfiche Forms	Laserfiche Forms
Instructor-Led Sessions	2 sessions remote (6 hours total)	4 sessions remote (12 hours total) or 2 days onsite	4 sessions remote (12 hours total) or 2 days onsite
Exercises Designed to Learn Tools and Explore Features	Included	Included	Included
Coaching on a Process Design	Not Included	1 session remote (2 hours total)	1 session remote (2 hours total)
Remote Post Training Configuration Assistance	Not Included	Not Included	Included, up to 30 calendar days from the last training session, not to exceed 10 hours

PROCESS AUTOMATION DESIGNER TRAINING ON LASERFICHE WORKFLOW

MCCi’s Laserfiche Workflow Training is designed to be highly interactive. The goal is to quickly empower individuals in the Client’s organization to learn Laserfiche Workflow. Individuals will learn how to build workflows to replace repetitive steps performed in the repository, send email notifications, promote uniform document filing and naming, and potentially integrate with other applications through data lookups and insertions. Lastly, training is completed in the Client’s Laserfiche environment, ensuring attendees have the right permissions to get started after training.

In Level 1, attendees are led through exercises designed to showcase commonly used features and tools within Laserfiche Workflow.

In Level 2, attendees get all Level 1 and spend an extra session building a process custom to your organization. In one 2-hour remote session prior to training, attendees are led through a process discovery workshop with the instructor to isolate and plan out a workflow. Attendees then apply their new skills during the last session to the outlined workflow.

In Level 3, attendees get all Level 2 and are offered additional remote assistance post-training. This is especially useful if the identified workflow is complex, and attendees prefer more coaching beyond the Level 2 training session.

CLIENT DELIVERABLES

- Provide each attendee participating in the training access to Workflow Designer and Workflow Administration Console
- Appoint a Workflow Configuration Administrator who has been through Laserfiche Administrator training to manage ongoing user and process permissions
- Provide the requisite IT resources
- Provide MCCi with a mapped-out narrative of specified business process sample forms, approval steps and approvers, metadata requirements, etc. (Level 2 and Level 3 only)

MCCI DELIVERABLES

- Provide Workflow Designer training on commonly used activities according to the level of package purchased. Activities that require skills not related to Laserfiche to configure (i.e., SQL queries, VBA, C#, Microsoft .NET Framework, API calls) are outside the scope of this training package
- Provide training for up to six (6) users per session

Description	Level 1	Level 2	Level 3
Product Training	Laserfiche Workflow	Laserfiche Workflow	Laserfiche Workflow
Instructor-Led Sessions	2 sessions remote (6 hours total)	4 sessions remote (12 hours total) or 2 days onsite	4 sessions remote (12 hours total) or 2 days onsite
Exercises Designed to Learn Tools and Explore Features	Included	Included	Included
Coaching on a Process Design	Not Included	1 session remote (2 hours total)	1 session remote (2 hours total)
Remote Post Training Configuration Assistance	Not Included	Not Included	Included, up to 30 calendar days from the last training session, not to exceed 10 hours

INTRODUCTION TO LASERFICHE – PROJECT INTRODUCTION TRAINING

As part of the Client’s new Laserfiche implementation project, this one-hour training course will provide them and their departmental subject-matter experts with an overview of the features and functionality of their Laserfiche platform. The training course is built to help the Client understand what Laserfiche is capable of and get them into the mindset of working in Laserfiche before we dive into the discovery and implementation phases of their project.

TOPICS INCLUDED IN THIS COURSE

- What is Laserfiche?
- What is metadata and how is it used in filing workflows to automate archiving documents?
- Best practices in creating/managing a repository.
- Overview of specific process automation tools, based on the Client’s platform/subscription/licensing.

MCCI DELIVERABLES

- Provide a one-hour remote training session/demonstration of the introductory topics for up to six (6) users per session
- Provide slide deck of session for download, if applicable

EXCLUSIONS

- MCCi is not responsible for providing training course examples specific to solutions provided in final project deliverables.

ASSUMPTIONS

- Training is to be completed after Client kick-off call, but before discovery phase.
- Client does not have the Training Center for Laserfiche subscription.

LASERFICHE QUICK FIELDS TRAINING

MCCi’s Quick Fields On-Site training is designed to empower Laserfiche administrators to create and run Quick Fields sessions that automate document identification, processing, and storage. Learners will participate in configuring a new session focusing on commonly used Quick Fields functionalities.

CLIENT DELIVERABLES

- Attend Laserfiche Administration Training prior to Quick Fields training

MCCI DELIVERABLES

- Install Quick Fields
- Provide project discovery
- Provide one (1) full day training or two (2) half-day trainings on purchased Quick Fields modules for up to six (6) users per session
- Quick Fields configuration assistance post training for up to 30 calendar days from the initial training, not to exceed eight (8) hours

3. DELIVERABLES

CONTRACTOR SHOULD DEVELOP THE FOLLOWING DELIVERABLES IN THE ASSESSMENT OF THE PARTICIPATING AGENCIES CURRENT SYSTEM AND PROPOSED SOLUTION (ADDRESSES ELEMENTS A-O UNDER SECTION 3 DELIVERABLES)

MCCi has partnered with industry-leading solutions to drive process improvement and innovation across organizations versus siloed technology department by department. MCCi’s clients are choosing Content Services & Intelligent Automation to drive the automation necessary, starting with processes as simple as scanning documents and going as far as implementing digital workers to perform time-consuming repetitive tasks. MCCi consults with our clients to identify the business issues and bottlenecks in processes and recommends how these processes can be automated utilizing technology tools. Whether clients are looking to implement self-hosted or in the cloud, we have solutions to tailor to each organization. We are passionate about empowering organizations to choose and implement right solution for their first initial roll-out and to meet their long-term goals.

CONSULTATION


As the Client begins the journey to choose the best technology, we start with a thorough discovery process to understand their current business needs and how those may change in the future. Our sales and client innovation teams then recommend a solution tailored to the Client’s needs. We determine the best implementation strategy, as well as ongoing support needs. Our goal is to deliver a final solution and work with them on their next project.

To complete discovery/assessment of existing records, system, and procedures, MCCi experts will conduct an analysis of the prospective client’s systems. The analysis is the study of the differences between two information systems or applications, often for determining how to bridge the space between where we are and where we want to be. New clients may be new to using a Content Services or Intelligent Automation solution or could be transitioning from another system. Existing clients may consider an analysis when looking to expand their system into other departments or throughout their enterprise. It is also an opportunity to investigate and report on how Client’s existing solution is being used versus its intended use. Either way, an analysis not only serves the

consulting needs, but can also mitigate inherent risks in a new project. Risks such as scope creep, unforeseen needs (e.g., people, conversions, integrations, equipment), and unknown stakeholders can be identified and cleared up at the very beginning of the project. This process involves determining, documenting, and approving the variance between business requirements and current capabilities. MCCi takes it a step further by providing recommendations and an action plan. The amount of time/cost of an analysis is dependent upon the system size and number of departments to be involved. The final deliverable is a report that can be given to Client in a format that can be edited. Any future changes to the report are the responsibility of Client. The report can detail the following:

- A summary of the current document flow path with recommended changes/requirements
- Equipment, software, and staffing recommendations
- Storage needs for each department
- Recommendations on the timing of phasing in departments (based on needs/complexity)
- Implementation recommendations
- Possible timeline and workplan or a Statement of Work detailing the project
- Suggested retention periods based on client’s needs and requirements
- Costs involved in initial project and expansions into various departments based on client’s needs
- Recommendations of availability and accessibility of various documents based on client’s requirements
- Recommendations of strategies on adoptions of new policies and procedures related to document management
- Recommendations for applying change management and training

MCCi can deliver results of the performed analysis in written form, as well as via an onsite meeting with key client stakeholders that should be attended by client CIO/IT Director, Application Administrators, departmental managers, and any other leadership members.

Sample Timeline Process Assessment- Pre Development*			
Task #	Task Name	Duration	Resources Needed
1	Kick-Off Meeting	1 day	MCCi Account Executive, MCCi Project Team, Client Project Sponsors
2	Process Analysis	5 days	MCCi Account Executive, MCCi Project Team, Client Project Sponsors, Client SME
2.1	Process Assessment - Pre-Development	1 day	
2.1.1	Meet Process Owners - Process 1		MCCi Account Executive, MCCi Project Team, Client Project Sponsors, Client SME
2.1.2	Meet Process Owners - Process 2		MCCi Account Executive, MCCi Project Team, Client Project Sponsors, Client SME
2.1.3	Meet Process Owners - Process 3		MCCi Account Executive, MCCi Project Team, Client Project Sponsors, Client SME
2.2	Deep Dive - Targeted Process - Process 1	1 day	
2.2.1	Review Existing Process Maps		MCCi Project Team, Client SME
2.2.2	Review SOPs		MCCi Project Team, Client SME
2.2.3	Meet with Process Owners		MCCi Project Team, Client SME
2.3	Deep Dive - Targeted Process - Process 2	1 day	
2.3.1	Review Existing Process Maps		MCCi Project Team, Client SME
2.3.2	Review SOPs		MCCi Project Team, Client SME
2.3.3	Meet with Process Owners		MCCi Project Team, Client SME
2.4	Deep Dive - Targeted Process - Process 3	1 day	
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2.4.1	Review Existing Process Maps		MCCI Project Team, Client SME
2.4.2	Review SOPs		MCCI Project Team, Client SME
2.4.3	Meet with Process Owners		MCCI Project Team, Client SME
2.5	Shadowing - Selected Process(s) Observations	1 day	
2.5.1	Process 1		MCCI Project Team, Client SME
2.5.2	Process 2		MCCI Project Team, Client SME
2.5.3	Process 3		MCCI Project Team, Client SME
3	Process Definition Documentation (PDD)	25 days	MCCi Account Executive, MCCI Project Team, Client Project Sponsors, Client SME
3.1	Create Final Draft	12 days	MCCI Project Team
3.2	Meet with Process Owners	1 day	MCCi Account Executive, MCCI Project Team, Client SME
3.3	Redline	4 days	Client Project Sponsors, Client SME
3.4	Final Corrections	4 days	MCCI Project Team
3.5	Client Approval – PDD	4 days	Client Project Sponsors
4	Solution Design Documentation (SDD)	25 days	MCCi Account Executive, MCCI Project Team, Client Project Sponsors, Client SME
4.1	Create Final Draft	12 days	MCCI Project Team
4.2	Meet with Process Owners	1 day	MCCi Account Executive, MCCI Project Team, Client SME
4.3	Redline	4 days	Client Project Sponsors, Client SME
4.4	Final Corrections	4 days	MCCI Project Team
4.5	Client Approval - SDD	4 days	Client Project Sponsors
5	Meet with Stakeholders to Deliver Report	.5 days	MCCi Account Executive, MCCI Project Team, Client Project Sponsors

*This timeline is provided as an example only. Actual timeline may differ based on project size, number of processes evaluated, and necessity for any change orders that may occur through the process. Qualifications for change orders can include, but are not limited to: post process approval revisions, additional resource requirements, etc. Actual timeline will depend upon client and vendor resource availability and responsiveness, as well as environment preparedness.

TAB 8 - VALUE ADDED PRODUCTS AND SERVICES

INCLUDE ANY ADDITIONAL PRODUCTS AND/OR SERVICES AVAILABLE THAT VENDOR CURRENTLY PERFORMS IN THEIR NORMAL COURSE OF BUSINESS THAT IS NOT INCLUDED IN THE SCOPE OF THE SOLICITATION THAT YOU THINK WILL ENHANCE AND ADD VALUE TO THIS CONTRACT FOR REGION 14 ESC AND ALL NCPA PARTICIPATING ENTITIES.

Please see our included Product Overviews below of value-added products and services.

SERVICE PACKAGES

LASERFICHE SYSTEM MIGRATION PACKAGE

MCCi's System Migration Package is designed for MCCi to assist with moving your existing Laserfiche infrastructure with your currently installed applications to your new server environment and upgrading to the latest Laserfiche supported versions.

CLIENT DELIVERABLES

- Provide Microsoft Window Server(s) that meets Laserfiche system requirements
- Provide a Windows account that has administrative rights to each new Laserfiche server, can create, write, and read the various Laserfiche databases, and query Active Directory
- Acquire, install, and setup TLS certificates that meet Laserfiche requirements
- Create backup of Laserfiche databases and restore in new SQL environment
- Transfer data to new environment

MCCi DELIVERABLES

- Install and configure one (1) instance of each existing Laserfiche application in one (1) environment (e.g., Test, Dev, Staging, QA, etc.)
- Register existing repositories in the new environment with the various Laserfiche applications
- Upgrade existing Laserfiche applications to newest supported version of Laserfiche
- Provide consultation on best practices for volume and Laserfiche database migrations
- Perform basic software deployment testing

EXCLUSIONS

MCCi is not responsible for the following:

- Installing and configuring failover clusters or load balancing
- Configuring servers in DMZs
- Updates to configuration in any Workflows, Forms, Quick Fields, or Import Agent Sessions migrated
- Configuring Identity Providers other than native Active Directory
- Installing or Configuring applications that were not already installed or configured
- Migrating custom settings or integrations

ASSUMPTIONS

- Google Chrome or Chromium Microsoft Edge is installed on all servers.
- Laserfiche Server version 8 and Laserfiche Workflow version 8.3 or later is currently installed.
- If applicable, Client has also ordered Installation and Initial Configuration of Active Directory Certificate Services package (see package description for full detail).

SELF-HOSTED DATA MIGRATION TO LASERFICHE CLOUD

MCCi's Self-Hosted Data Migration to Laserfiche Cloud Package is designed to migrate an existing self-hosted Laserfiche system to a new Laserfiche Cloud environment.

CLIENT DELIVERABLES

- Provide a Windows account that has administrative rights to each server (can create, write, and read the various Laserfiche databases, and has administrative rights to the Laserfiche applications)
- Purchase a Laserfiche Cloud license that includes the features and data needed to migrate the self-hosted system

MCCI DELIVERABLES

- Migrate a single (1) repository to the Laserfiche Cloud system
- Assist Client with switching one (1) installation of a self-hosted application (Windows Client, Quick Fields, Import Agent, etc.) to work with Laserfiche Cloud
- Perform basic software deployment testing

EXCLUSIONS

MCCi is not responsible for the following:

- Upgrading Laserfiche applications except for the Laserfiche Server
- Upgrading SQL Server
- Migration of Laserfiche workflows, Laserfiche Forms Business Processes, or multiple repositories
- Migration or installation of Quick Fields Sessions
- Switching Windows users or groups to Repository users or groups
- Migrating repositories over 400 GB (volumes + SQL database)

ASSUMPTIONS

- Laserfiche server is on the latest version available to utilize the Laserfiche Data Migration tool.
- If Client has SQL 2016 or newer, additional professional services time may be needed to complete the migration.
- Laserfiche server is running Windows Server 2008 or higher.
- Data is being migrated to a new Laserfiche Cloud system.
- During the migration of the self-hosted system to Laserfiche Cloud, both systems will be unavailable.
- Data is being migrated to a new Laserfiche Cloud system.
- The current Client infrastructure meets the requirements needed to install and run the Laserfiche Cloud Migration tool.

LASERFICHE INSTALLATION PACKAGE

MCCi's Installation Package is designed for MCCi to install and do initial configuration of the applications that come with your Laserfiche Licensing Platform (e.g., Avante, Rio, Subscription).

CLIENT DELIVERABLES

- Provide Microsoft Windows Server(s) that meet(s) the Laserfiche system requirements
- Acquire, install, and set up TLS Certificates that meet Laserfiche requirements
- Provide a Windows account that has administrative rights to each Laserfiche server (can create, write, and read the various Laserfiche databases, and query Active Directory)

MCCI DELIVERABLES

- Install and configure one (1) instance of each application in one (1) environment (e.g., Test, Dev, Staging, QA, etc.) as outlined in the Laserfiche Assumptions section
- Perform basic software deployment testing

EXCLUSIONS

MCCi is not responsible for the following:

- Installing and configuring failover clusters or load balancing
- Configuring servers in DMZs
- Migration of existing Laserfiche environment/applications to new environment
- Configuring identity providers other than Active Directory

ASSUMPTIONS

- Google Chrome or Chromium Microsoft Edge is installed on all Laserfiche servers.
- If applicable, Client has also ordered Installation and Initial Configuration of Active Directory Certificate Services package (see package description for full detail).

LASERFICHE SUBSCRIPTION STARTER INSTALLATION PACKAGE

MCCi's Subscription Starter Installation Package is designed for MCCi to install and do initial configuration of the following applications: Laserfiche Server, Laserfiche Directory Server, Laserfiche Web Client, Import Agent, and Starter Audit Trail.

CLIENT DELIVERABLES

- Provide Microsoft Windows Server(s) that meet(s) the Laserfiche system requirements
- Acquire, install, and set up TLS Certificates that meet Laserfiche requirements
- Provide a Windows account that has administrative rights to each Laserfiche server (can create, write, and read the various Laserfiche databases, and query Active Directory)

MCCI DELIVERABLES

- Install and configure one (1) instance of each application in one (1) environment (e.g., Test, Dev, Staging, QA, etc.) as outlined in the Laserfiche Assumptions section
- Perform basic software deployment testing

EXCLUSIONS

MCCi is not responsible for the following:

- Installing and configuring failover clusters or load balancing
- Configuring servers in DMZs
- Migration of existing Laserfiche environment/applications to new environment
- Configuring Identity Providers other than Active Directory
- Installation of Laserfiche Windows Client, Workflow, Laserfiche Forms, Web Link, Distributed Computing Cluster, Mobile Server, Federated Search, and ScanConnect

ASSUMPTIONS

- Google Chrome or Chromium Microsoft Edge is installed on all Laserfiche servers.
- If applicable, Client has also ordered Installation and Initial Configuration of Active Directory Certificate Services package (see package description for full detail).

PUBLIC FACING LASERFICHE WEB PRODUCTS INSTALLATION AND CONFIGURATION PACKAGE

MCCi's public facing Laserfiche installation and configuration package is designed to implement a single Laserfiche web product in a Client's DMZ or Reverse Proxy environment and configure it to use Directory Server authentication.

CLIENT DELIVERABLES

- Acquire, install, and set up TLS Certificates that meet Laserfiche requirements
- Provide servers in DMZ or Reverse Proxy
- Configure appropriate DNS entries
- Provide a Windows account that has administrative rights to each Laserfiche server (can create, write, and read the various Laserfiche databases, and query Active Directory)

MCCI DELIVERABLES

- Install and configure one (1) instance of Laserfiche Web Client, Forms, Mobile, or WebLink in one (1) environment (E.g., Test, Dev, Staging, QA, etc.) in a DMZ or Reverse Proxy
- Configure Laserfiche software to use TLS Certificates supplied by Client
- Configure Laserfiche software to communicate with necessary internal servers
- Assuming Weblink is the instance chosen for installation and configuration:
 - Basic configuration using the WebLink Designer not to exceed three (3) hours
 - Configure WebLink access security to one (1) level from the root on one (1) repository for the public user account
- Perform basic software deployment testing

EXCLUSIONS

MCCi is not responsible for the following:

- Installing and configuring failover clusters or load balancing
- Provisioning Client servers in DMZs
- Customization of WebLink asp Microsoft .NET Framework file
- Configuration of Folder Filter Expression

ASSUMPTIONS

- Google Chrome or Chromium Microsoft Edge is installed on all Laserfiche servers

UPGRADE TO LFDS INSTALLATION PACKAGE

MCCi's Upgrade to LFDS Installation Package is designed to upgrade a Client's system from repository authentication to using directory server authentication. This includes migrating repository user accounts and groups to directory server and configuring existing Laserfiche web products to use directory server authentication.

CLIENT DELIVERABLES

- Provide Microsoft Windows Server that meets Laserfiche system requirements
- Acquire, install, and set up TLS Certificates that meet Laserfiche requirements
- Provide a Windows account that has administrative rights to each Laserfiche server (can create, write, and read the various Laserfiche databases, and query Active Directory)

MCCI DELIVERABLES

- Install and configure LFDS in one (1) environment (E.g., Test, Dev, Staging, QA, etc.)
- Migrate repository user accounts and groups to LFDS
- Configure Laserfiche web products for Single Sign-On using LFDS authentication in one (1) environment (E.g., Test, Dev, Staging, QA, etc.)
- Perform basic software deployment testing

EXCLUSIONS

MCCi is not responsible for the following:

- Adding new users, creating new groups, access rights, and security
- Setting up external DMZ
- Installing and configuring Failover Clusters or Load Balancing
- Migrating existing Laserfiche environment/applications to new environment
- Configuring Identity Providers other than native Active Directory

ASSUMPTIONS

- Client's Laserfiche application server is on Laserfiche Version 10.4.1 or later
- Google Chrome or Chromium Microsoft Edge is installed on all Laserfiche servers
- Included if applicable; Installation and Configuration of AD CS Services package, see package description for full detail.
- Repository user accounts can be migrated using the User Account Migration tool. If the tool is not able to be used, a change order may be needed.

LASERFICHE VERSION UPGRADE PACKAGE

MCCi's Laserfiche Version Upgrade Package is designed for MCCi to upgrade your existing Laserfiche applications to the newest supported versions on the servers Laserfiche is currently installed on.

CLIENT DELIVERABLES

- Provide a Windows account that has administrative rights to each Laserfiche server (can create, write, and read the various Laserfiche databases, and query Active Directory)
- Acquire, install, and set up TLS Certificates that meet Laserfiche requirements

MCCI DELIVERABLES

- Update existing modules in one (1) environment to the newest supported version of Laserfiche.
- Perform basic software deployment testing.

EXCLUSIONS

MCCi is not responsible for the following:

- Migrating Laserfiche system or MS SQL to new Windows servers
- Migrating existing Laserfiche environment/applications to new environment
- Installing and configuring failover clusters or load balancing
- Configuring servers in DMZs
- Configuring identity providers other than native Active Directory

- Metadata configuration

ASSUMPTIONS

- Existing SQL Server version instances meet Laserfiche requirements.
- Existing Windows Server version meets Laserfiche requirements.
- Google Chrome or Chrome Microsoft Edge is installed on all Laserfiche servers.
- Included if applicable; Installation and Configuration of AD CS Services package, see package description for full detail.
- Laserfiche Server version 8 and Laserfiche Workflow version 8.3 or later are currently installed.

LASERFICHE LICENSING PLATFORM AND VERSION UPGRADE PACKAGE

MCCi's Laserfiche Licensing Platform and Version Upgrade Package is designed for MCCi to switch your existing Laserfiche Licensing Platform (e.g., United, Teams, Avante, Rio) to a new Laserfiche Licensing Platform (e.g., United to Avante or Avante to Rio, etc.) on the servers that Laserfiche is currently installed on. This includes installing new modules that are included with your new licensing platform, installing and configuring directory server, converting/migrating users from your repository to directory server if needed, and upgrading your existing Laserfiche applications to the newest supported versions.

CLIENT DELIVERABLES

- Provide a Windows account that has administrative rights to each Laserfiche server (can create, write, and read the various Laserfiche databases, and query Active Directory)
- Acquire, install, and set up TLS Certificates that meet Laserfiche requirements

MCCI DELIVERABLES

- Perform licensing update to upgrade Client to defined platform and newest supported version of Laserfiche
- Install and configure new modules in one (1) environment (e.g., Test, Dev, Staging, QA, etc.) not currently owned by Client to not exceed: directory server, Web Client, Forms, Workflow as outlined in the Laserfiche assumptions section
- Install and configure Directory Server on the appropriate server per MCCi best practices
- Convert/migrate repository user accounts to Directory Server (some pre-requisites apply)
- Configure Laserfiche web products for Single Sign-On using LFDS authentication in one (1) environment (e.g., Test, Dev, Staging, QA, etc.)

EXCLUSIONS

MCCi is not responsible for the following:

- Migrating Laserfiche system or MS SQL to new Windows Servers
- Migrating existing Laserfiche environment/applications to new environment
- Installing and configuring failover clusters or load balancing
- Configuring servers in DMZs
- Configuring identity providers other than native Active Directory
- Metadata Configuration

ASSUMPTIONS

- Existing SQL Server version instances meet Laserfiche requirements.
- Existing Windows Server version meets Laserfiche requirements.
- Google Chrome or Chrome Microsoft Edge is installed on all Laserfiche servers.
- Included if applicable; Installation and Configuration of AD CS Services package, see package description for full detail.
- Laserfiche Server version 8 and Laserfiche Workflow version 8.3 or higher are currently installed.

LASERFICHE SANDBOX INSTALLATION PACKAGE

MCCi's Laserfiche Sandbox Installation Package is designed for Clients whose subscription licensing includes a Sandbox license.

CLIENT DELIVERABLES

- Provide Microsoft Windows application server that meets Laserfiche system requirements

- Acquire, install, and set up TLS Certificates that meet Laserfiche requirements
- Provide a Windows account that has administrative rights to each Laserfiche server (can create, write, and read the various Laserfiche databases, and query Active Directory)

MCCI DELIVERABLES

- Install a single (1) sandbox environment on a single server including up to ten (10) users, Laserfiche Directory Server and any additional add-ons purchased from MCCI, such as portals

EXCLUSIONS

MCCI is not responsible for replicating other environments into Sandbox (E.g., Migrating workflows, forms processes, folder structures, security, user accounts, integrations, etc.).

ASSUMPTIONS

- Google Chrome or Chrome Microsoft Edge is installed on all Laserfiche servers.
- Client owns Laserfiche Business Subscription Tier or Sandbox licensing.
- Client has acquired, installed, and set up TLS Certificates that meet Laserfiche requirements on Client's system.

LASERFICHE ADD-ON APPLICATION INSTALLATION

MCCI's Add-on Application Installation Package is designed for MCCI to install and perform the initial basic configuration of one (1) Laserfiche application.

CLIENT DELIVERABLES

- Provide Microsoft Windows Server(s) that meet(s) the Laserfiche system requirements
- Acquire, install, and set up TLS Certificates that meet Laserfiche requirements
- Provide a Windows account that has administrative rights to each Laserfiche server (can create, write, and read the various Laserfiche databases, and query Active Directory)

MCCI DELIVERABLES

- Install and configure one (1) application in one (1) environment (e.g., Test, Dev, Staging, QA, etc.) as outlined in the Laserfiche Assumptions section
- Perform basic software deployment testing
- Provide one-hour overview on the application installed

EXCLUSIONS

MCCI is not responsible for the following:

- Installing and configuring failover clusters or load balancing
- Installing and configuring LFDS
- Installing and configuring Laserfiche PowerPack by MCCI
- Installation of Configuring servers in DMZs
- Migration of existing Laserfiche environment/applications to new environment
- Configuration of identity providers other than Active Directory

ASSUMPTIONS

- Google Chrome or Chromium Microsoft Edge is installed on all Laserfiche servers.

LASERFICHE SAML IDENTITY PROVIDER PACKAGE

MCCI's Laserfiche SAML Identity Provider Package is designed to help Client configure directory server with a SAML 2.0 supported identity provider.

CLIENT DELIVERABLES

- Provide MCCI with claims mapping configuration information from SAML 2.0 Identity Provider (IdP)

MCCI DELIVERABLES

- Configure directory server to use the Client's SAML identity provider for authentication in the Laserfiche system
- Provide Client training on how to create accounts in directory server from the Client's SAML identity provider

EXCLUSIONS

MCCI is not responsible for the following:

- Configuring individual Laserfiche web products to use Single Sign On

- Troubleshooting issues with the SAML identity provider
- Identifying provider conversion: the migration (or conversion) of users from the current identity provider to the new SAML identity provider, including, without limitation, directory server and repository users
- Migrating (or converting) of users from current identity provider to the new SAML identity provider, including directory server and repository users
- Creating accounts in directory server from Client's SAML identity provider

ASSUMPTIONS

- Laserfiche Directory Server is installed and configured.
- Client's identity services must support SAML 2.0 tokens.
- Client must have sufficient access and privileges to their SAML-compatible identity services to configure Laserfiche as an authorized SAML service provider. This includes (but is not limited to) firewalls, exporting metadata, and importing metadata.

LASERFICHE POWERPACK BY MCCi INSTALLATION AND CONFIGURATION PACKAGE

MCCi provides installation and configuration services to assist MCCi's Clients in quickly utilizing the benefits of the powerful features included in PowerPack.

CLIENT DELIVERABLES

- Provide IIS web server to host the Data Analytics website
- Provide SQL Server to host Data Analytics database (will be created during the initial configuration)
- Provide server/workstation to install OCR Scheduler and Data Analytics service
- Provide Laserfiche Workflow server to install and configure custom Workflow Activities
- Provide a dedicated Laserfiche named user license for PowerPack to utilize

MCCi DELIVERABLES

- Install PowerPack components on a single server (workflow custom activities will be installed on the workflow server)
- Configure one OCR Scheduler schedule
- Install PDF and Microsoft Office iFilters
- Provide one (1) remote overview training for up to one (1) hour

EXCLUSIONS

MCCi is not responsible for the following:

- Configuring OCR Scheduler to extract text from electronic files other than PDF and MS Office files (Tiff files will still be OCR'd)
- Running OCR on files in Laserfiche record series
- Creating workflows

ASSUMPTIONS

- PowerPack is whitelisted with Client's antivirus software.
- Client environment supports the latest Laserfiche SDK runtimes.
- Microsoft Visual C++ 2015 Update 3 is installed and configured on Client system.
- Microsoft .NET Framework 4.8 is installed and configured on Client system.
- Laserfiche Workflow 10.2 or later is installed and configured on Client system.
- Laserfiche Server 10.2 is installed and configured on Client system.

LASERFICHE FILING WORKFLOW CONFIGURATION

MCCi's Laserfiche Filing Workflow Configuration Services are designed to be highly collaborative. The goal is to provide a customized process that allows Client's organization to archive specified records in a proper format and location that is consistent with Client's organization's standards. To execute, MCCi's team of expert Project Managers and System Engineers will work with Client's Project Manager to build a Filing Workflow in Client's Laserfiche environment.

CLIENT DELIVERABLES

- Provide MCCi with a mapped-out narrative and flowchart of the specified business process

- Thoroughly define each resource and activity in the business process, including, without limitation, any exceptions
- Complete requirements gathering with MCCi Project Manager to define document types, naming schemes, folder paths, and metadata

MCCI DELIVERABLES

- Configure a Laserfiche Filing Workflow to file documents in the Laserfiche repository (not to exceed 15 document types)
- Rename documents and route to appropriate folder structure
- Create up to three (3) Laserfiche templates and up to seven (7) fields per template
- Provide requirements gathering
- Set root-level security
- Conduct half-day of remote “train the trainer” training on administering and executing the processes built by the MCCi project team
- Perform alpha and beta testing on the built processes. MCCi will transition project to Client UAT team once beta is complete and successful

EXCLUSIONS

MCCi is not responsible for the following:

- Configuring business routing logic
- Restructuring metadata
- Determining Records Management settings
- Cleaning up existing documents
- Configuring automated security
- Installing software

ASSUMPTIONS

- Workflow is already installed and configured.

LASERFICHE REPOSITORY CONFIGURATION

MCCi’s Laserfiche Repository Configuration Services are designed to assist the Client with establishing a basic repository structure. The goal is to start a foundation for the Client’s organization to build their Laserfiche repository from and help establish consistent standards the Client’s organizations can build on. MCCi’s team will work with Client’s Project Manager to discover the templates and structure that fits the Client needs.

CLIENT DELIVERABLES

- Define each user and group necessary to access Laserfiche
- Complete requirements gathering with MCCi Project Team to define document types, naming schemes, folder paths, and metadata

MCCI DELIVERABLES

- Provide requirements gathering
- Create up to two (2) folder structures that consist of three (3) tiered levels
- Create up to two (2) Laserfiche templates with up to seven (7) fields each
- Create up to two (2) Laserfiche User Groups
- Set entry access security for up to two-level
- Conduct one (1) session (three (3) hours total) of remote “train the trainer” training on Basic Laserfiche and User functions.

EXCLUSIONS

MCCi is not responsible for the following:

- Configuring business routing logic
- Restructuring metadata
- Determining Records Management settings
- Cleaning up existing documents
- Configuring automated security

- Installing software
- Configuring workflows

RECORDS MANAGEMENT CONFIGURATION

MCCi will configure Records Management in Client’s repository using Transparent Records Management (TRM). Using TRM, both records managers and general users can organize the same repository in the manner they each prefer, simultaneously. The process is “transparent” because it enables general users to see through the complex records management layout to their desired structure. Records management requirements do not interfere with day-to-day business needs, and records managers can retain control over the way information is categorized and filed outside of the view of everyday users of the system.

CLIENT DELIVERABLES

- Provide Client representative to participate in organizing the repository through templates and folder structure and plan out the templates, record types, and folder structure, not to exceed 15 record types that will be implemented
- Provide all necessary information on the retention schedules to be implemented
- Have a testing team complete User Acceptance Testing (UAT) within two (2) weeks of the completion of deployment

MCCI DELIVERABLES

- Create up to three (3) templates, up to fifteen (15) Record Series, and up to fifteen (15) folders
- Build workflow(s) to file records in correct record series and create a shortcut in the end user folder structure. Workflows will be based on information that users input into the template when adding the document to Laserfiche. These workflows will be for filing purposes only and not include any business process steps for approval, review, etc.
- Build a workflow to run on a schedule set by Client that sends an email notification (to Client’s Records Manager and up to one (1) other user) with up to three (3) links to display a list in the Web Client of all records available for cutoff, disposition, or vital records that need review
- Conduct half-day of remote “train the trainer” training on administering and executing the processes built by the MCCi project team
- Perform alpha and beta testing on the built processes. MCCi will transition project to Client UAT team once beta is complete and successful

EXCLUSIONS

MCCi is not responsible for the following:

- Creating training documentation for these processes
- Managing or providing upkeep of the Laserfiche Records Management System
- Configuring any e-mail notifications for records management actions outside of basic notifications for records available for cutoff, records available for disposition, and vital documents for review
- Installing software

ASSUMPTIONS

- Client owns Laserfiche Records Management Edition and Laserfiche Workflow.
- Client owns and has Laserfiche Web Client installed and configured.

LASERFICHE QUICK FIELDS BASIC CONFIGURATION PACKAGE

MCCi’s Quick Fields basic configuration package is designed for MCCi to install Laserfiche Quick Fields, configure a single desired Quick Fields session with one classification type, configure real-time lookup, and create a corresponding Laserfiche Template and fields.

CLIENT DELIVERABLES

- Provide lookup credentials
- Format Client forms in a manner that is conducive to QF indexing. Client may need to change the format of forms for all functionality to work consistently.

MCCI DELIVERABLES

- Install Quick Fields
- Configure one (1) Quick Fields session
- Set up one (1) session classification and lookup using Real-Time Lookup
- Provide Lookup which allows for one (1) ODBC connection and one (1) field data query
- Create one (1) Laserfiche Template with up to seven (7) fields

EXCLUSIONS

MCCi is not responsible for the following:

- Configuring Workflow
- Creating dynamic fields
- Providing Quick Fields training

ASSUMPTIONS

- Client has procured appropriate licensing for Real-Time Lookup.

LASERFICHE QUICK FIELDS ADVANCED CONFIGURATION PACKAGE

MCCi's Quick Fields advanced configuration package is designed for MCCi to install Laserfiche Quick Fields, configure a single Quick Fields session with maximum of five (5) classification types, configure Real-Time Lookup, and create a corresponding Laserfiche Template and fields.

CLIENT DELIVERABLES

- Provide lookup credentials
- Procure appropriate licensing for Real-Time Lookup and Classifications
- Format Client forms in a manner that is conducive to QF indexing. Client may need to change the format of forms for all functionality to work consistently.

MCCI DELIVERABLES

- Install Quick Fields
- Configure one (1) Quick Fields session
- Set up a maximum of five (5) session classifications, each with one (1) Real-Time Lookup using ODBC and three (3) field data queries per lookup
- Create five (5) Laserfiche Templates with up to twenty-five (25) fields total

EXCLUSIONS

MCCi is not responsible for the following:

- Configuring workflow
- Creating dynamic fields
- Providing Quick Fields training

LASERFICHE CLOUD SINGLE SIGN-ON

MCCi will assist Clients in configuration and testing of supported Single Sign-On integration with Laserfiche Cloud.

CLIENT DELIVERABLES

- Download/export of Client-side SAML configuration file for import into LF Cloud
- Configure existing SAML-compatible SSO platform supported by LF Cloud

MCCI DELIVERABLES

- Setup SSO parameters within LF Cloud to communicate with Client-side SAML-compatible application
- Convert one LF Cloud user account to use SSO configuration
- Perform testing of SSO functionality from LF Cloud Web/Windows Client
- Demonstrate to Client how to configure additional LF Cloud users for SSO

EXCLUSIONS

MCCi is not responsible for the following:

- Assistance with setting up SAML-compatible application in Client-side SSO platform
- Configuration of SSO with unsupported or non-SAML providers
- Configuration of multiple users to use SSO within LF Cloud

ASSUMPTIONS

- Client has administrative access to Client-side SSO platform with ability to create applications
- Client has or can create user account within SSO platform for testing purposes

LASERFICHE CONNECTOR INTEGRATION CONFIGURATION AND TRAINING

MCCi provides installation, configuration services and training to assist MCCi's clients in quickly utilizing the streamlined experience for integrating Laserfiche with a line of business applications.

CLIENT DELIVERABLES

- Ensure that user's machine and application to be integrated with Connector meet Laserfiche Connector requirements outlined in the hardware requirements
- Provide a test utility to ensure that the application screen is viable prior to purchase. Client is responsible for ensuring the compatibility of applications prior to purchase
- All data used for configuration must be available from the application screens
- Appoint a Laserfiche Connector Administrator
- Provide Laserfiche metadata requirements

MCCI DELIVERABLES

- Install and integrate Laserfiche Connector on one (1) machine within the current Laserfiche system environment pursuant to the Laserfiche Connector requirements
- Assist in configuration of integration for up to one (1) application screen with three (3) standard actions on one machine
- Standard Actions Included: Scan, Import, Search Client, Search Weblink, and/or Search Web Access, launching from the desired application to Laserfiche
- Define Laserfiche metadata structure to support the specified integration
- Define Laserfiche security to support the integration
- Provide remote "Train the Trainer" training while performing integration of the Client's software with Connector

ASSUMPTIONS

- Not all applications are guaranteed to work with Laserfiche Connector. Even if a test was successful with the Laserfiche Connector Test Utility, configuring with the full software may not work as intended.

ABBYY FLEXICAPTURE INSTALLATION AND INITIAL CONFIGURATION PACKAGE - SELF-HOSTED/MANAGED CLOUD

CLIENT DELIVERABLES

- Provide Microsoft Windows server(s) that meet the ABBYY system requirements
- Acquire, install, and setup SSL/TLS Certificate that meet the ABBYY requirements
- Provide a Windows account that has administrative rights to each ABBYY server (can create, write, and read the various ABBYY databases, and query Active Directory)

MCCI DELIVERABLES

- Install and provide initial configuration of one (1) instance of each application in one (1) environment (e.g., Test, Dev, Staging, QA, etc.) not to exceed three (3) FlexiCapture servers

EXCLUSIONS

MCCi is not responsible for the following:

- Installing and configuring failover clusters or load balancing
- Configuring servers in DMZs

ASSUMPTIONS

- Google Chrome or Chromium Microsoft Edge is installed on all Laserfiche servers.

ABBYY FLEXICAPTURE INSTALLATION AND INITIAL CONFIGURATION PACKAGE - ABBYY CLOUD

CLIENT DELIVERABLES

- Provide local Microsoft Windows server or workstation that meets the ABBYY system requirements for FlexiCapture Developer's Package
- Provide Windows account that has administrative rights to each windows server or workstation
- Provide CSV Files of Vendor and Business Unit data to be uploaded to Cloud

MCCI ACTIVITIES AND/OR DELIVERABLES

- Install the FlexiCapture Developers Package on one (1) workstation and/or server within the Client's environment.
- Configure ABBYY FlexiCapture Connect config.json file with connection and import and export settings

EXCLUSIONS

MCCi is not responsible for the following:

- Installing and configuring failover clusters or load balancing
- Configuring servers in DMZs

ASSUMPTIONS

- Google Chrome or Chromium Microsoft Edge is installed on all Laserfiche servers.

ABBYY FLEXICAPTURE FOR INVOICES PROJECT CONFIGURATION WITH LASERFICHE PACKAGE

CLIENT DELIVERABLES

- Provide a Windows account that has administrative rights to each ABBYY server (can create, write, and read the various ABBYY databases, and query Active Directory)
- Set up linked server to Client's AP System database and provide SQL views to query Vendor and Invoice data
- Provide a dedicated Laserfiche named user license for the ABBYY LF Connector to utilize
- Provide methods for importing invoices into FlexiCapture and credentials required for accessing
- Provide sample invoices for up to five (5) vendors, fifteen (15) per vendor

MCCI ACTIVITIES AND/OR DELIVERABLES

- Create one (1) FlexiCapture for Invoices project that will capture the following values from an invoice: Business Unit, Vendor, Invoice Number, Invoice Date, Gross Amount, Account Number, and Purchase Order Number and up to three (3) custom trainable fields (not requiring the development of a FlexiLayout).
- Provide one (1) document definition that describes the location of document elements and indicates fields to be used in data extraction
- Configure import profiles from which FlexiCapture will import invoices
- Configure export process to one location per document definition
- Train Flexicapture identification for up to five (5) vendors, fifteen (15) per vendor

EXCLUSIONS

MCCi is not responsible for the following:

- Capturing tax information, line items extraction, purchase order matching, and GL Coding
- Providing additional/custom FlexiLayouts
- Installing and configuring failover clusters or load balancing
- Configuring servers in DMZs

ASSUMPTIONS

- ABBYY FlexiCapture software is already installed, and initial configuration has been completed.
- Google Chrome or Chromium Microsoft Edge is installed on all FlexiCapture servers.
- All servers meet ABBYY's recommended specifications and all pre-requisites are installed.

ABBYY FLEXICAPTURE FOR INVOICES PROJECT CONFIGURATION – NON-LASERFICHE PACKAGE

CLIENT DELIVERABLES

- Provide a Windows account that has administrative rights to each ABBYY server (can create, write, and read the various ABBYY databases, and query Active Directory)

- Set up linked server to Client's AP System database and provide SQL views to query Vendor and Invoice data
- Provide a dedicated Laserfiche named user license for the ABBYY LF Connector to utilize
- Provide methods for importing invoices into FlexiCapture and credentials required for accessing
- Provide sample invoices for up to five (5) vendors, 15 per vendor

MCCI ACTIVITIES AND/OR DELIVERABLES

- Create one (1) FlexiCapture for Invoices project that will capture the following values from an invoice: Business Unit, Vendor, Invoice Number, Invoice Date, Gross Amount, Account Number, and Purchase Order Number and up to three (3) custom trainable fields (not requiring the development of a FlexiLayout).
- Provide one (1) document definition that describes the location of document elements and indicates fields to be used in data extraction
- Configure import profiles from which FlexiCapture will import invoices
- Configure export process to one location per document definition
- Train invoices for up to five (5) vendors, 15 per vendor

EXCLUSIONS

MCCi is not responsible for the following:

- Capturing tax information, line items extraction, purchase order matching, and GL Coding
- Providing additional/custom FlexiLayouts
- Creating custom development or coding that may be required for export or other processes
- Installing and configuring failover clusters or load balancing
- Configuring servers in DMZs

ASSUMPTIONS

- ABBYY FlexiCapture software is already installed, and initial configuration has been completed.
- Google Chrome or Chromium Microsoft Edge is installed on all FlexiCapture servers.
- All servers meet ABBYY's recommended specifications and all pre-requisites are installed.

ABBYY FLEXICAPTURE UPGRADE PACKAGE

CLIENT DELIVERABLES

- Provide a Windows account that has administrative rights to each ABBYY server (can create, write, and read the various ABBYY databases, and query Active Directory)
- Provide access to current version of FlexiCapture Installation files
- Backup FlexiCapture SQL Database and all FlexiCapture dedicated server(s)
- Verify that all pending tasks have been completed and all batches have been processed

MCCI ACTIVITIES AND/OR DELIVERABLES

- Compact and backup existing Invoice Project(s) files and training batches
- Uninstall existing version of FlexiCapture
- Download and install latest compatible version of FlexiCapture or FlexiCapture for Invoices in one (1) environment (e.g., Test, Dev, Staging, QA, etc.) not to exceed three (3) FlexiCapture servers
- Upgrade existing project(s) to latest version

EXCLUSIONS

MCCi is not responsible for the following:

- Installing and configuring failover clusters or load balancing
- Configuring servers in DMZs

ASSUMPTIONS

- Google Chrome or Chromium Microsoft Edge is installed on all Laserfiche servers.
- All servers meet ABBYY's recommended specifications and all pre-requisites are installed.

CITIES DIGITAL ARCGIS INTEGRATION INSTALLATION AND CONFIGURATION PACKAGE

ArcGIS is a geographic information system used by municipalities to display data related to positions on a map. The ArcGIS integration by Cities Digital (CDI) links existing GIS layers to documents in Laserfiche, displaying both sets of information together within the assets on the map.

CLIENT DELIVERABLES

- Provide ArcGIS layer integration information for integration
- Ensure that TLS 1.2 is configured on all Laserfiche servers
- Replace existing ArcGIS layers with the integration layers on your ArcGIS map

MCCI DELIVERABLES

- Install CDI ArcGIS Integration software on a single (1) server to communicate with a single (1) repository
- Configure CDI ArcGIS Integration for up to five (5) ArcGIS Layers
- Provide one (1) hour of remote overview of integration

EXCLUSIONS

- MCCI is not responsible for creating any layers within ArcGIS.

ASSUMPTIONS

- Weblink 9.0 or later is installed and configured on Client system
- Web Client 9.0 or later is installed and configured on Client system
- ArcGIS Online and ArcGIS Server 10.3.1 or later is installed and configured on Client system

CITIES DIGITAL DOCUSIGN INTEGRATION INSTALLATION AND CONFIGURATION PACKAGE

DocuSign is an online document signature platform. The Cities Digital (CDI) DocuSign integration allows documents to be sent from and received back into the Laserfiche repository, as well as providing a suite of Laserfiche Workflow activities that allow for some automation of this process.

CLIENT DELIVERABLES

- Ensure that DocuSign Connect feature is enabled
- Ensure that TLS 1.2 is configured on all Laserfiche Servers
- Provide an outward-facing Windows server for installation of the Listener
- Provide DocuSign credentials for configuring and testing the integration

MCCI DELIVERABLES

- Install the following CDI DocuSign Integration components: Listener, Web Client integration, Workflow Activities, Desktop Client integration on one (1) workstation
- Configure DocuSign Connect
- Perform preliminary testing
- Provide one (1) hour of remote overview of integration

EXCLUSIONS

- MCCI is not responsible for Workflow Creation.

ASSUMPTIONS

- Weblink 9.0 or later is installed and configured on Client system
- Web Client 9.0 or later is installed and configured on Client system
- Laserfiche Server 9.0 or later is installed and configured on Client system
- Laserfiche Client 9.0 or later is installed and configured on Client system
- Workflow 9.0 or later is installed and configured on Client system
- Client owns DocuSign licensing level that includes integration keys

CITIES DIGITAL MICROSOFT DYNAMICS CRM INTEGRATION INSTALLATION AND CONFIGURATION PACKAGE

The Cities Digital (CDI) Dynamics CRM integration for Laserfiche allows for easy connectivity and interaction between Laserfiche and Dynamics CRM.

CLIENT DELIVERABLES

- Provide Dynamics CRM credentials to be used by the integration
- Provide URL for Dynamics CRM

MCCI DELIVERABLES

- Install Dynamics CRM Integration
- Configure up to three (3) Dynamics Entities

- Perform alpha testing
- Provide one (1) hour of remote overview of integration

EXCLUSIONS

- MCCi is not responsible for configuration in Dynamics CRM.

ASSUMPTIONS

- Weblink 9.0 or later is installed and configured on Client system
- Web Client 9.0 or later is installed and configured on Client system
- Laserfiche Server 9.0 or later is installed and configured on Client system
- Laserfiche Client 9.0 or later is installed and configured on Client system
- Workflow 9.0 or later is installed and configured on Client system

TRACKER INTEGRATION INSTALLATION AND CONFIGURATION PACKAGE

MCCi’s Tracker Integration eliminates the need for third-party integration tools to provide a streamlined user experience for scanning, importing, and retrieving documents in Laserfiche from the Tracker application. This integration leverages built-in web features of Laserfiche allowing tracker to trigger these actions using standard HTTP requests.

MCCI DELIVERABLES

- Perform system assessment to ensure compatibility/readiness for Tracker integration
- Configure Tracker for Client-specific settings: gather/compile all details and provide to Tracker team for them to deploy
- Configure Laserfiche Form for file uploads
- Create Laserfiche Workflows to file documents brought into the repository by the integration
- Perform testing and solution demonstration
- Provide one (1) hour of remote overview of integration

EXCLUSIONS

MCCi is not responsible for the following:

- Installation of Laserfiche Server, Forms, or Workflow
- Configuration of servers in DMZs

ASSUMPTIONS

- Laserfiche Forms 10.4 or later installed and configured on Client system.
- Laserfiche Web Client 10.4 or later installed and configured on Client system.
- Laserfiche Workflow (for filing new documents to specific folders in the repository once scanned or imported) installed and configured on Client system.

TRACKER INTEGRATION UPGRADE PACKAGE

For Clients with existing integrations through MCCi using third party tools like RatchetX, this package will upgrade them to the new built-in integration.

MCCI DELIVERABLES

- Perform system assessment to ensure compatibility/readiness for Tracker integration
- Configure Tracker for Client-specific settings (gather/compile all details and provide to Tracker team for them to deploy)
- Configure Laserfiche Form for file uploads
- Create workflow configuration or updates to existing workflow as required (up to four (4) hours)
- Perform testing and solution demonstration
- Provide one (1) hour of remote overview of integration

EXCLUSIONS

MCCi is not responsible for the following:

- Installation of Laserfiche Server, Forms, or Workflow
- Configuring servers in DMZs

ASSUMPTIONS

- Laserfiche Forms 10.4 or later is installed and configured on Client system.
- Laserfiche Web Client 10.4 or later installed and configured on Client system.
- Laserfiche Workflow (for filing new documents to specific folders in the repository once scanned or imported) installed and configured on Client system.

LASERFICHE DOCUSIGN INTEGRATION INSTALLATION AND CONFIGURATION PACKAGE

This package will allow basic integration of DocuSign with Laserfiche for electronically signed documents.

CLIENT DELIVERABLES

- Ensure that DocuSign Connect feature is enabled
- Ensure that TLS 1.2 is configured on all Laserfiche servers
- Provide an outward-facing Windows server for installation of the Laserfiche Web Import Service
- Provide DocuSign credentials for configuring and testing the integration

MCCI DELIVERABLES

- Install and configure Laserfiche Web Import Service
- Configure DocuSign integration
- Perform alpha testing

EXCLUSIONS

- MCCI is not responsible for DocuSign configuration outside of the integration components.

MCCI CWSAPI INSTALLATION AND CONFIGURATION PACKAGE

MCCI CWSAPI allows Client developers to integrate their third-party software with Laserfiche.

CLIENT DELIVERABLES

- Provide a dedicated Laserfiche named user/keyed integrator license for CWSAPI to utilize
- Provide an outward-facing server for installation of the integration
- Provide SQL database to facilitate upload “chunking”

MCCI DELIVERABLES

- Install CWSAPI Integration
- Complete basic configuration of the CWSAPI utility
- Provide (1) hour of remote overview of integration and Swagger

EXCLUSIONS

- MCCI will assist the Client’s development team as questions or issues arise but is not responsible for writing the custom integration to the Client’s software itself.

ASSUMPTIONS

- Laserfiche 9.2 or later is installed and configured on Client system
- Microsoft .NET Framework 4.6.1 is installed and configured on Client system
- Laserfiche SDK 10.4 is installed and configured on Client system
- Microsoft Visual C++ Runtime 2017 is installed and configured on Client system

MCCI ENERGOV INTEGRATION INSTALLATION AND CONFIGURATION PACKAGE

MCCI EnerGov integration leverages the MCCI CWSAPI to integrate with EnerGov, bringing documents with metadata into the repository and passing a reference back to EnerGov to facilitate ease of viewing documents.

CLIENT DELIVERABLES

- Provide desired EnerGov Fields for mapping metadata to Laserfiche
- Appoint an IT resource to work with MCCI for configuration and training
- Communicate Laserfiche metadata requirements
- Facilitate access to EnerGov technical staff and resources as needed
- If EnerGov “Intelligent Object” configuration is desired, it is Client’s responsibility to configure the appropriate settings in EnerGov or to work with EnerGov to do so. Intelligent Objects is the EnerGov feature that allows for creating letters and other documents and having them attached to EnerGov records. EnerGov configuration is needed to set this up and to have these documents treated as attachments to be stored in Laserfiche.

- Provide an outward-facing server for installation of the integration
- Provide a dedicated Laserfiche named user/keyed integrator license to operate the integration
- Confirm with EnerGov ownership of any needed SDK, API, and/or general EnerGov licensing requirements related to this integration.
- Provide SQL database to facilitate upload “chunking”
- Perform User Acceptance Testing (UAT)

MCCi DELIVERABLES

- Provide list of EnerGov fields available for mapping to Laserfiche
- Install EnerGov Integration Utility on Client server
- Assist in configuring up to three (3) EnerGov Entity Types (EnerGov Plan, EnerGov Permit, etc.)
- Create integration Laserfiche template for initial incoming documents
- Create integration Laserfiche workflow to translate from the integration template to the final Laserfiche template
- Provide remote “Train the Trainer” training in a single session for up to three (3) hours to empower Client to configure other available EnerGov Entity Types
- Perform alpha testing

EXCLUSIONS

- MCCi is not responsible for configuration of Laserfiche filing workflows unless a separate package or SOW is included

ASSUMPTIONS

- EnerGov Self-hosted or EnerGov Cloud platform is installed and configured on Client system
- MCCi EnerGov Integration will be installed on Client’s self-hosted servers
- Laserfiche 9.2 or later is installed and configured on Client system
- Microsoft .NET Framework 4.8 is installed and configured on Client system
- Laserfiche SDK 10.4 is installed and configured on Client system
- Microsoft Visual C++ Runtime 2017 is installed and configured on Client system

MCCI NEOGOV INTEGRATION INSTALLATION AND CONFIGURATION PACKAGE

MCCi NeoGov integration leverages MCCi’s CWSAPI to integrate with NeoGov, bringing documents with metadata into the repository and passing a reference back to EnerGov to facilitate ease of viewing documents.

CLIENT DELIVERABLES

- Provide desired NeoGov Fields for mapping metadata to Laserfiche
- Appoint an IT resource to work with MCCi for configuration and training
- Communicate Laserfiche metadata requirements
- Facilitate access to NeoGov technical staff and resources as needed
- Provide an outward-facing server for installation of the integration
- Ensure that web server within the organization’s DMZ with IIS is installed
- Ensure that TLS Certificate is installed and created with a publicly addressable subdomain, such as <https://lfintegrations.cityname.gov>
- Provide SQL database to facilitate upload “chunking”
- Provide a dedicated named user/keyed integrator license for the integration
- Perform alpha testing

MCCi DELIVERABLES

- Install NEOGOV Integration Utility on Client server
- Configure Integration Utility to pair core NEOGOV metadata fields to Laserfiche metadata fields
- Create integration Laserfiche template for initial incoming documents
- Create integration Laserfiche workflow to translate document name to document type and move to final HR Laserfiche template for the documents
- Perform alpha testing

EXCLUSIONS

- MCCI is not responsible for the configuration of filing workflows unless a separate package or SOW is included.

ASSUMPTIONS

- Laserfiche 9.2 or later is installed and configured on Client system
- Microsoft .NET Framework 4.8 is installed and configured on Client system
- Laserfiche SDK 10.4 is installed and configured on Client system
- Microsoft Visual C++ Runtime 2017 is installed and configured on Client system

ONESPAN DEPLOYMENT WITH BASIC LASERFICHE INTEGRATION

OneSpan is an online signing platform with integration options within Laserfiche. The integration allows users to begin the signing process from within the Repository or to configure a workflow process to handle the assignment of the needed signatures. When signing is complete, the documents and signing certificates are returned to the repository. This package includes OneSpan setup, integration setup and configuration, but does not provide creation of processes built through Forms or Workflow.

CLIENT DELIVERABLES

- Ensure Laserfiche Web Client is installed on a web server that is accessible to OneSpan Sign servers
- Provide pre-created documents, ready for the signing process
- Appoint IT resources to work with MCCI for configuration and training
- Provide a dedicated Laserfiche named user license to operate the integration
- Ensure that TLS 1.2 is configured on all Laserfiche servers

MCCI DELIVERABLES

- Conduct a project kickoff call to set objectives and review systems/processes used
- Conduct OneSpan Sign overview/training (one (1) session) with Client stakeholders and technical resources (up to three (3) people trained)
- Assist Client with OneSpan Sign account configuration
- Assist Client with custom branding
- Configure one (1) signing template
- Install and configure OneSpan Sign Laserfiche Connector Service
- Design, build, and deploy Signing Process using Laserfiche Web Client or OneSpan Sign interfaces to send documents for signature and receive notification when signing is complete

EXCLUSIONS

MCCI is not responsible for the following:

- Creating and/or providing the process to build or create documents to be signed
- Integrating with Laserfiche Workflow

ONESPAN DEPLOYMENT WITH ADVANCED LASERFICHE INTEGRATION

OneSpan is an online signing platform with integration options within Laserfiche. The integration allows users to begin the signing process from within the Repository or to configure a workflow process to handle the assignment of the needed signatures. When signing is complete, the documents and signing certificates are returned to the repository. This package includes OneSpan setup, integration setup, and configuration, as well as training/creation of one (1) process built through Forms or Workflow.

CLIENT DELIVERABLES

- Ensure Laserfiche is on version 10.4 or later with Workflow and Web Client installed; Web Client server must be accessible to OneSpan Sign servers
- Provide pre-created documents, ready for the signing process
- Have testing team complete User Acceptance Testing (UAT) within two (2) weeks of the completion of deployment
- Provide a dedicated Laserfiche named user license to operate the integration
- Ensure that TLS 1.2 is configured on all Laserfiche servers

MCCI DELIVERABLES

- Assist Client with deployment of OneSpan Sign using the OneSpan-Laserfiche integration for one (1) signing process. Client can choose to have signing transactions:
 - Automatically send using the workflow activities included in the integration, or
 - Send signing transaction ad hoc using the Laserfiche Web Client integration
- Conduct a project kickoff call to set objectives and review systems/processes used
- Conduct OneSpan Sign overview/training one (1) session with Client stakeholders and technical resources
- Assist Client with OneSpan Sign account configuration
- Assist Client with custom branding
- Configure one (1) signing template
- Install and configure OneSpan Sign Laserfiche Connector Service
- Design, build, and deploy Signing Process using Laserfiche Web Client or Laserfiche Workflow to send documents for signature and receive callback when signing is complete
- Perform alpha and beta testing on the built signing processes. MCCi will transition project to Client UAT team once beta test is complete

EXCLUSIONS

MCCi is not responsible for the following:

- Creating and/or providing process to build or create documents to be signed
- Integrating OneSpan with Laserfiche Workflow

ONESPAN DEPLOYMENT WITH NO LASERFICHE INTEGRATION

OneSpan is an online signing platform with integration options within Laserfiche. The integration allows users to begin the signing process from within the Repository or to configure a workflow process to handle the assignment of the needed signatures. When signing is complete, the documents and signing certificates are returned to the repository. This integration covers only OneSpan setup and not the integration portion.

CLIENT DELIVERABLES

- Provide pre-created documents, ready for the signing process
- Have a testing team complete User Acceptance Testing (UAT) within two (2) weeks of the completion of deployment
- Must have TLS 1.2 configured on all Laserfiche application servers

MCCI DELIVERABLES

- Assist Client with deployment of OneSpan Sign using the OneSpan Interface for one (1) signing process
- Conduct a project kickoff call to set objectives and review systems/processes used
- Conduct OneSpan Sign overview/training (one (1) session) with Client stakeholders and technical resources
- Assist Client with OneSpan Sign account configuration
- Assist Client with custom branding
- Configure one (1) signing template
- Perform alpha and beta testing on the built signing processes. MCCi will transition project to Client UAT team once Beta is complete

EXCLUSIONS

MCCi is not responsible for the following:

- Creating and/or providing process to build or create documents to be signed
- Providing training documentation for configured processes
- Performing Laserfiche integration

LASERFICHE CONNECTOR FOR ONESPAN INSTALLATION AND TRAINING

OneSpan is an online signing platform with integration options within Laserfiche. This integration allows users to begin the signing process from within the repository or to configure a workflow process to handle the assignment of the needed signatures. When signing is complete, the documents and signing certificates are returned to the repository. This package assumes the Client already has OneSpan and would only cover the integration portion.

CLIENT DELIVERABLES

- Ensure Laserfiche is on version 10.4.x or higher with Workflow and Web Client installed; Web Client server must be accessible to OneSpan Sign servers.
- Provide pre-created documents, ready for the signing process
- Assemble a team of Laserfiche administrators to receive overview training on Laserfiche Connector components
- Provide a dedicated Laserfiche named user license to operate the integration
- Ensure that TLS 1.2 is configured on all Laserfiche servers

MCCI DELIVERABLES

- Conduct a project kickoff call to set objectives and review systems/processes used
- Install and configure OneSpan Sign Laserfiche Connector Service
- Conduct Laserfiche Connector for OneSpan overview/training (one (1) session) with Client stakeholders and technical resources

EXCLUSIONS

MCCi is not responsible for the following:

- Creating and/or providing process to build or create documents to be signed
- Creating and/or providing build-out of actual signing process
- Creating and/or providing training documentation for configured processes

LASERFICHE REPOSITORY ADMINISTRATOR TRAINING

MCCi’s Repository Administrator Training is available as a single half-day session or a full day (two half-day sessions). The goal is for your organization to have a trained Repository Administrator. The single half-day session focuses on ongoing management of the repository with a focus on user management, troubleshooting user permissions, monitoring and auditing user activity, and managing metadata. The full day includes ongoing management as well as considerations for future growth, focusing on setting up new security permissions, repository planning, creation of new metadata types, and more. The complete list of training topics is listed below.

- User Management
- Core User Security
- Supplemental User Security*
- Monitoring User Activity
- Metadata Management
- Repository Architecture Overview
- Web and Windows Clients Differences
- General Repository Settings
- Audit Trail (if purchased)
- Weblink Designer (if purchased)*
- Technical Support Overview
- Recycle Bin Settings

*Available for full day training only

CLIENT DELIVERABLES

- Have a license available for each attendee participating in the training
- Provide the requisite IT resources

MCCI DELIVERABLES

- Provide Repository Administration training according to the level of package purchased
- Provide training for up to six (6) users per session

Description	Basic	Full
Product Training	Laserfiche Web Management Laserfiche Administration Console Audit Trail (if purchased)	Laserfiche Web Management Laserfiche Administration Console Weblink Designer (if purchased) Audit Trail (if purchased)
Instructor-Led Sessions	1 session remote (3 hours total) or half day onsite	2 sessions remote (6 hours total) or 1 day onsite
Great For	Ongoing Management of the Repository	Ongoing Management of the Repository Future Growth of the Repository

LASERFICHE IT ADMINISTRATOR TRAINING (SELF-HOSTED)

MCCI's IT Administrator Training is available as a standalone one-hour session for organizations that have a clear division in responsibilities between infrastructure, application support, and repository management. The IT Administrator may be responsible for server maintenance, backups, user licensing, and/or product installations on end-user workstations. The goal is to familiarize the IT administrator with an overview of the Laserfiche environment, repository architecture for backup purposes, user licensing, and installation files.

- Laserfiche Environment Overview
- Repository Architecture Overview
- Laserfiche Directory Server
- User and Application Licensing
- Volumes
- Installation Files
- Technical Support Overview

CLIENT DELIVERABLES

- Have a license available for each attendee participating in the training
- Provide the requisite IT resources

MCCI DELIVERABLES

- Provide Laserfiche IT Administration training according to the level of package purchased
- Provide training for up to six (6) users per session

USER TRAINING

MCCI's New User Training is a great introduction to the Laserfiche repository, which is accessed through an application called the Laserfiche Client. Attendees will become familiar with how to import new content, to search and retrieve existing content, and to export. Your organization can choose whether training is conducted on the web-based or on the Windows desktop Client.

BASIC

Your organization can work closely with the product trainer to identify user functions, customizing the training agenda on what attendees need to know for how they will use the repository. The trainer can emphasize certain topics and can eliminate or briefly describe others.

- Import Options
- Laserfiche Scanning
- Search and Retrieval
- Metadata Reports
- Dashboard (Laserfiche Cloud)
- Export Options
- Annotations Tools
- Templates & Fields
- OCR and Generating Text

ADVANCED

MCCI's Advanced User Training is a continued examination of features available in the Laserfiche Client. Your organization can work closely with the product trainer to emphasize certain topics and can eliminate or briefly describe others.


- Laserfiche Snapshot
- Microsoft Office Integration
- Advanced Search Syntax
- Version Control
- Tags
- Custom Quick Search
- User Options
- Repository Design Considerations

CLIENT DELIVERABLES

- Have a license available for each attendee participating in the training
- Provide the requisite IT resources

MCCI DELIVERABLES

- Provide Laserfiche User training according to the level of package purchased
- Provide training for up to six (6) users per session

Description	Basic	Full	Advanced
Product Training	Laserfiche Client	Laserfiche Client	Laserfiche Client
Instructor-Led Sessions	1 session remote (3 hours total) or half day onsite	2 sessions remote (6 hours total) or 1 day onsite	1 session remote (3 hours total) or half day onsite
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Great For	Onboarding a Single Department New Users to Laserfiche	Train the Trainer Learning & Development Department	Seasoned Laserfiche Users
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Laserfiche Records Management Module Training

Client should have full knowledge of internal records management policies and have prior experience in records management. This training will be quoted for Clients with the Records Management functionality of Laserfiche.

RECORDS MANAGEMENT TRAINING

- Records Series
- Versioning
- Cutoff Criteria
- Hold Period
- Final Disposition
- Event Dispositions
- Records Folders
- Security Tags
- Cutoff Eligibility
- Disposition Actions
- Interim Transfers
- Permanent Records
- Document Links
- Vital Records
- Retention Period
- Time Dispositions
- Accession / Freezing
- Destruction

ADMIN CONSOLE SETUP

- Cycle Definitions Setup
- Retention Schedules Setup
- Locations Setup
- Cutoff Instructions Setup

CLIENT DELIVERABLES

- Have a license available for each attendee participating in the training
- Appoint a Records Management Administrator who has been through Laserfiche Administrator training to manage ongoing user and process permissions
- Provide the requisite IT resources

MCCI DELIVERABLES

- Provide Records Management training according to the level of package purchased.
- Provide training for up to six (6) users per session

Description	Level 1	Level 2	Level 3
Instructor-Led Sessions	2 sessions (6 hours total) or 1 day onsite	4 sessions (12 hours total) or 2 days onsite	4 sessions (12 hours total) or 2 days onsite
Laserfiche Workflow for Uniform Filing Training 2 sessions (6 hours) or 1 Day Onsite	Not Included	Included	Included
Remote Post Training Configuration Assistance	Not Included	Not Included	Included, up to 30 calendar days from the last training session, not to exceed 10 hours

PROCESS AUTOMATION DESIGNER TRAINING ON LASERFICHE FORMS

MCCI's Laserfiche Forms Training is designed to be highly interactive. The goal is to quickly empower individuals in your organization to learn Laserfiche Forms. Individuals will learn not only how to create and maintain webforms but also apply their new skills to streamlining approval and review processes. Lastly, training is completed in your Laserfiche Forms environment, ensuring attendees have the right permissions to get started after training.

In Level 1, attendees are led through exercises designed to showcase commonly used features and tools within Laserfiche Forms.

In Level 2, attendees get all Level 1 and spend an extra session building a process custom to your organization. In one (1) 2-hour remote sessions prior to training, attendees are led through a process design workshop with the instructor to isolate and plan out a process. Attendees then apply their new skills during the last session to the outlined process.

In Level 3, attendees get all of Level 2 and are offered additional remote assistance post-training. This is especially useful if the identified process is complex, and attendees prefer more coaching beyond the Level 2 training session.

CLIENT DELIVERABLES

- Have a license available for each attendee participating in the training
- Appoint a Forms Configuration Administrator who has been through Laserfiche Administrator training to manage ongoing user and process permissions
- Provide the requisite IT resources
- Provide MCCi with a mapped-out narrative of specified business process sample forms, approval steps and approvers, metadata requirements, etc. (Level 2 and Level 3 only)

MCCI DELIVERABLES

- Provide Process Automation training according to the level of package purchased. CSS and JavaScript are outside the scope of this training package
- Provide training for up to (six) 6 users per session

Description	Level 1	Level 2	Level 3
Product Training	Laserfiche Forms	Laserfiche Forms	Laserfiche Forms
Instructor-Led Sessions	2 sessions remote (6 hours total)	4 sessions remote (12 hours total) or 2 days onsite	4 sessions remote (12 hours total) or 2 days onsite
Exercises Designed to Learn Tools and Explore Features	Included	Included	Included
Coaching on a Process Design	Not Included	1 session remote (2 hours total)	1 session remote (2 hours total)
Remote Post Training Configuration Assistance	Not Included	Not Included	Included, up to 30 calendar days from the last training session, not to exceed 10 hours

PROCESS AUTOMATION DESIGNER TRAINING ON LASERFICHE WORKFLOW

MCCi’s Laserfiche Workflow Training is designed to be highly interactive. The goal is to quickly empower individuals in your organization to learn Laserfiche Workflow. Individuals will learn how to build workflows to replace repetitive steps performed in the repository, send email notifications, promote uniform document filing and naming, and potentially integrate with other applications through data lookups and insertions. Lastly, training is completed in your Laserfiche environment, ensuring attendees have the right permissions to get started after training.

In Level 1, attendees are led through exercises designed to showcase commonly used features and tools within Laserfiche Workflow.

In Level 2, attendees get all Level 1 and spend an extra session building a process custom to your organization. In one 2-hour remote sessions prior to training, attendees are led through a process discovery workshop with the instructor to isolate and plan out a workflow. Attendees then apply their new skills during the last session to the outlined workflow.

In Level 3, attendees get all Level 2 and are offered additional remote assistance post-training. This is especially useful if the identified workflow is complex, and attendees prefer more coaching beyond the Level 2 training session.

CLIENT DELIVERABLES

- Provide each attendee participating in the training access to Workflow Designer and Workflow Administration Console
- Appoint a Workflow Configuration Administrator who has been through Laserfiche Administrator training to manage ongoing user and process permissions
- Provide the requisite IT resources
- Provide MCCi with a mapped-out narrative of specified business process sample forms, approval steps and approvers, metadata requirements, etc. (Level 2 and Level 3 only)

MCCI DELIVERABLES

- Provide Workflow Designer training on commonly used activities according to the level of package purchased. Activities that require skills not related to Laserfiche to configure (i.e., SQL queries, VBA, C#, Microsoft .NET Framework, API calls) are outside the scope of this training package
- Provide training for up to six (6) users per session

Description	Level 1	Level 2	Level 3
Product Training	Laserfiche Workflow	Laserfiche Workflow	Laserfiche Workflow
Instructor-Led Sessions	2 sessions remote (6 hours total)	4 sessions remote (12 hours total) or 2 days onsite	4 sessions remote (12 hours total) or 2 days onsite
Exercises Designed to Learn Tools and Explore Features	Included	Included	Included
Coaching on a Process Design	Not Included	1 session remote (2 hours total)	1 session remote (2 hours total)
Remote Post Training Configuration Assistance	Not Included	Not Included	Included, up to 30 calendar days from the last training session, not to exceed 10 hours

INTRODUCTION TO LASERFICHE – PROJECT INTRODUCTION TRAINING

As part of your new Laserfiche implementation project, this one-hour training course will provide you and your departmental subject-matter experts with an overview of the features and functionality of your Laserfiche platform. The training course is built to help you understand what Laserfiche is capable of and get you into the mindset of working in Laserfiche before we dive into the discovery and implementation phases of your project.

TOPICS INCLUDED IN THIS COURSE

- What is Laserfiche?
- What is metadata and how is it used in filing workflows to automate archiving your documents?
- Best practices in creating/managing your repository.
- Overview of your process automation tools, based on your platform/subscription/licensing.

MCCI DELIVERABLES

- Provide a one-hour remote training session/demonstration of the introductory topics for up to six (6) users per session
- Provide slide deck of session for download, if applicable

EXCLUSIONS

- MCCi is not responsible for providing training course examples specific to solutions provided in final project deliverables.

ASSUMPTIONS

- Training is to be completed after Client kick-off call, but before discovery phase.
- Client does not have the Training Center for Laserfiche subscription.

LASERFICHE QUICK FIELDS TRAINING

MCCi's Quick Fields On-Site training is designed to empower Laserfiche administrators to create and run Quick Fields sessions that automate document identification, processing, and storage. Learners will participate in configuring a new session focusing on commonly used Quick Fields functionalities.

CLIENT DELIVERABLES

- Attend Laserfiche Administration Training prior to Quick Fields training

MCCI DELIVERABLES

- Install Quick Fields
- Provide project discovery
- Provide one (1) full day training or two (2) half-day trainings on purchased Quick Fields modules for up to six (6) users per session
- Quick Fields configuration assistance post training for up to 30 calendar days from the initial training, not to exceed eight (8) hours

INSTALLATION AND INITIAL CONFIGURATION OF ACTIVE DIRECTORY CERTIFICATE SERVICES (AD CS)

MCCi will install and do an initial configuration of the Active Directory Certificate Services (AD CS) on a Windows Server. This configuration will be used to create the necessary TLS certificates required for the software implementation.

CLIENT DELIVERABLES

- Provide a Windows Server that meets the requirements necessary to install and configure an AD CS as outlined by Microsoft
- Install CA Certificate on end-user machines (recommended to use Group Policy)

MCCI DELIVERABLES

- Install AD CS on one (1) Windows Server
- Complete initial configuration of AD CS
- Create necessary certificates to use with Laserfiche and ABBYY products from the newly installed AD CS

EXCLUSIONS

MCCi is not responsible for the following:

- Maintaining or troubleshooting AD CS in any manner after the initial configuration is complete
- Maintaining the validity of certificates created from the AD CS. This includes renewing certificates that expire

ASSUMPTIONS

- For MCCi to be able to perform the installation and configuration of this service, Client must be able to log in with an administrative account that belongs to the Enterprise Admins and the root domain's Domain Admins group.
- Domain Functional Level and Forest Functional Level are Windows Server 2016 at a minimum.

MCCI AUTOMATED FILING IMPLEMENTATION SERVICES FOR SCANNING DELIVERY

MCCi will assist in the delivery of Laserfiche images scanned by MCCi Scanning by creating or modifying a filing workflow for the document types included in the Scanning order. The purpose of this package is to provide the Professional Services team with the means to provide a seamless delivery of the images scanned and indexed by the MCCi Scanning team. Both teams will collaborate to ensure the delivery and import of Client images into their Laserfiche system.

CLIENT DELIVERABLES

- Complete requirements gathering with MCCi Project Manager to define naming schemes and folder paths for document types included in the Scanning order.

MCCI DELIVERABLES

- Hold Client discovery meeting
- Import all Laserfiche Briefcases from MCCi Scanning into one (1) Laserfiche repository
- Create or modify one filing workflow as needed for filing the documents included in the imported Laserfiche Briefcases provided by MCCi Scanning (not to exceed five (5) document types)
- Set document type root-level security

EXCLUSIONS

MCCi is not responsible for the following:

- Implementing automated Business Process routing logic
- Creating and modifying Laserfiche templates and metadata
- Creating and modifying Records Management configurations
- Modifications and alterations of existing documents in the Laserfiche repository
- Automated security configuration
- Installing and configuring software
- Setting up and modifying users and groups for the Laserfiche repository

ASSUMPTIONS

- Laserfiche System is already installed and configured in the Client's environment.
- Users and groups are set up for the Laserfiche repository.

IMPLEMENTATION MANAGEMENT PACKAGE

MCCi will manage the work, communication, and documentation MCCi deems necessary for successful project delivery.

MCCI DELIVERABLES

- Manage Client communication
- Produce project documentation
- Oversee risk/issue management
- Oversee meeting scheduling
- Ensure deliverables are met
- Budgeting and Resource Management

MCCI BLOCK OF HOURS PACKAGE

This is a non-refundable block of hours, at a fixed cost to be used within 45 days of project kickoff, for MCCi Laserfiche Content Services work. MCCi will assign a Laserfiche Certified technical resource to assist the Client with their content services project. **Unused hours will expire after 45 days.**

CLIENT DELIVERABLES

- Provide a Windows account that has administrative rights to each Laserfiche server (can create, write, and read the various Laserfiche databases, and query Active Directory).
- Acquire, install, and set up TLS Certificates that meet Laserfiche requirements.

EXCLUSIONS

MCCi is not responsible for the following:

- Creating custom coding and scripting
- Providing project management services
- Installing and configuring DMZ
- Configuring or modifying network or infrastructure
- Providing formal Laserfiche application training
- Configuring Laserfiche SDK

ASSUMPTIONS

- Google Chrome or Chrome Microsoft Edge is installed on all Laserfiche servers.
- Ensure that TLS 1.2 is configured on all Laserfiche Servers.
- All services will be performed Monday – Friday, 8 am to 5 pm EST.

MCCI CONSULTING SERVICES – PROCESS ASSESSMENT PACKAGE

MCCi's Consulting Services – Process Assessment Package is designed for MCCi to meet with the Client onsite for two (2) consecutive days to conduct an assessment of the Client's business process and provide a detailed write-up of the pain points and respective recommendations for improvements and resolutions using MCCi products and services. **CLIENT DELIVERABLES**

- Provide a single point of contact responsible for coordinating communications and scheduling amongst Client stakeholders.

MCCI DELIVERABLES

- Provide two (2) consecutive days onsite for Client interviews to define business process and pain points
- Provide one (1) written report on as-is and to-be states of business process, identified pain points, and suggested remedies using MCCi products and services

EXCLUSIONS

MCCi is not responsible for:

- Training and/or video recordings.
- Developing a written Statement of Work
- Conducting the implementation of suggested remedies and solutions

MCCI CONSULTING SERVICES – PROCESS ASSESSMENT AS A SERVICE – WITH CELONIS

MCCi’s Consulting Services – Process Assessment as a Service offering is designed for MCCi to meet with the Client to conduct an assessment of the Client’s business process(es) and provide a detailed write-up of the pain points and respective recommendations for improvements and resolutions using MCCi products and services. MCCi will configure Celonis and deploy agents to monitor identified applications and users, as well as prepare a report identifying the results of the processing mining performed and process deviations therein. The Client will be interviewed by the MCCi Project Manager and Business Analyst to document the reasons for process deviations and opportunities for process improvement and automation. Finally, MCCi will deliver a proposed Statement of Work for up to one (1) project for up to one (1) process to be improved.

CLIENT DELIVERABLES

- Provide a single point of contact responsible for coordinating communications and scheduling amongst Client stakeholders.

MCCI DELIVERABLES

- Provide one (1) day onsite for Client interviews to define up to two (2) business process(es) and pain points
- Provide one (1) written report on as-is and to-be states of business process(es), identified pain points, and suggested remedies using MCCi products and services
- Provide one (1) written report on process deviations with figures provided by Celonis showing:
 - Amount of time each deviation adds to the process(es)
 - Narrative description of the deviation(s)
 - Findings from interviews regarding deviations
 - Recommendations for eliminating or improving the processing of each deviation
- Configuration of Celonis and respective agents
- Development of one (1) Statement of Work for up to one (1) process to be improved.

EXCLUSIONS

MCCi will not be responsible for:

- Training and/or video recordings
- Conducting the implementation of suggested remedies and solutions
- Providing Celonis licensing/subscription

ASSUMPTIONS

- Client will provide access to Celonis for at least three (3) MCCi users and at least two (2) Client users during the Client’s Celonis subscription period.

MANAGED CLOUD SETUP PACKAGES

MCCi sets up Client’s Managed Cloud infrastructure on Client’s behalf, providing a secure and compliant environment without the worry of day-to-day management.

MCCI DELIVERABLES

- Provide Azure compute and networking resources
- Deploy security and identity management configurations

- Setup monitoring and alerting
- Configure Backups and Update Management

EXCLUSIONS

- Migrating existing data
- Anything not expressly included

ATTENDED INFRASTRUCTURE ACCESS

MCCi's Attended Infrastructure Access is a service for Clients that are unable to grant the MCCi team unattended access to the project infrastructure being utilized. This package is necessary in the case that attended access is required due to, but not limited to, the following:

- Navigating Client availability and rescheduling, MCCi staff schedules, and time zone conflicts
- Limitation of remote access functions
- In session issues that arise
- Limited screen space
- Client questions and interaction during attended sessions

CLIENT DELIVERABLES:

- Provide enough attended access availability to accommodate the MCCi project team scheduling requests
- Adhere to agreed-upon scheduling for attended sessions
- Be available during entire attended session in case of issues with host machine, etc.

EXCLUSIONS

- Recording attended sessions
- Training

ASSUMPTIONS

- MCCi will have hardware input control
- Failure to abide by scheduling needs can result in a negative impact to the project timeline
- Client will have all needed credentials ready and available during attended sessions

MCCi'S SUPPLEMENTAL SUPPORT PACKAGES

As Client's first-tier solution provider, MCCi provides multiple options for technical support. Client's annual renewal covers application break/fix support, version downloads, and continued educational resources. MCCi offers supplemental support packages to cover remote training, basic configuration services, and maintenance of existing business processes. MCCi Managed Support Services (MSS) or Process Administration Support Services (PASS) packages are strongly encouraged to be included with every renewal. Supplemental Support Packages are annual subscriptions and pricing is based on the package purchased and an advanced discounted block of hours, which expire on the same date as Client's annual renewal.

LASERFICHE

Description	Managed Support Services		Process Administration Support Services	
	MSS	MSS 2	PASS	PASS 2
Easy access to MCCi's team of Certified Technicians for application break/fix support issues (i.e., error codes, bug fixes, etc.) ⁺	■	■	■	■
Remote access support through web conferencing service ⁺	■	■	■	■
Access to product update version and hotfixes (Client Download) ⁺	■	■	■	■
24/7 access to the Laserfiche Support Site and Laserfiche Answers discussion forums ⁺	■	■	■	■
Additional Remote Basic Training	■	■	■	■
Additional System Settings Consultation	■	■	■	■
Assistance with Implementation of Version Updates	■	■	■	■
Annual Review (upon Client's request) of Administration Settings	■	■	■	■
Priority Offering of Laserfiche CPPs & Laserfiche Empower Registration Scholarships	■	■	■	■
Configuration and maintenance of <i>basic</i> business processes and MCCi packaged solution utilizing Laserfiche Forms and Workflow		■	■	■
Configuration of Laserfiche Quick Fields sessions		■	■	■
Basic Records Management Module Overview Training		■	■	■
Administration Configuration Services		■	■	■
Dedicated Certified Professional			■	■
Proactive recurring consultation calls upon the Client's request			■	■
Annual Review of business process configurations				■
Institutional Knowledge of Client's Solution				■
Maintenance of MCCi/Client configured <i>complex</i> business processes				■
Ability to schedule after-hours migrations/upgrades Monday-Friday 8 am to 10 pm ET and Saturday-Sunday from 12 pm to 4 pm ET				■
Basic JavaScript, CSS, and Calculations for Laserfiche Forms [*]				■

⁺ Client's Support/Subscription Renewal includes these benefits, regardless of whether a supplemental package is purchased.

^{*} Excludes the development of new integrations, large-scale development projects, and SQL queries.

^{**} **Hours:** MCCi allows clients to use their hours for a multitude of services, as long as a request will not start a service that cannot be completed

with the hours available. None of the packages listed above are intended to be utilized to configuration a new *complex* business process. In those instances, a separate SOW is required.

BUSINESS PROCESS DEFINITIONS (RELATIVE TO THE TABLE ABOVE)

A Workflow, Forms, or Quick Fields process that automates or streamlines an organization-specific process.

- **BASIC:** A business process requiring minimal configuration and virtually no institutional knowledge of the Client’s business process, allowing an MCCi Application Support Analyst to assist with configuration, support, and maintenance of the process.
- **COMPLEX:** A large business process with an extensive configuration that is mission-critical to the organization.
 - *EXAMPLES:* Large accounts payable process with a high volume of transactions, approval steps, database lookups, etc. Complex business processes require MCCi’s Application Support Analyst to have institutional/process knowledge to configure the process.
 - For creation of new complex Forms, Workflow, and Transparent Records Management configurations, please discuss a Business Process Configuration Service with Client’s Account Executive or Account Manager.
- **MCCi Packaged Solution:** A solution MCCi has created for a market that has a specific business process automation use.

ABBY

	Managed Support Services		Process Administration Support Services	
	MSS	MSS 2	PASS	PASS 2
Easy access to MCCi’s team of Certified Technicians for application break/fix support issues (i.e., error codes, bug fixes, etc.) ⁺	■	■	■	■
Remote access support through webconferencing service ⁺	■	■	■	■
Additional System Settings Consultation	■	■	■	■
Annual Review of Administration Settings	■	■	■	■
Create/update users or groups, import profiles, or update batches	■	■	■	■
Editing ABBY export script, import from Laserfiche, fields/variables within an existing project, or training		■	■	■
Dedicated Certified Professional			■	■
Proactive recurring consultation calls upon the Client’s request			■	■
Annual Review of business process configurations				■
Institutional Knowledge of Client’s Solution				■

⁺ Client’s Support/Subscription Renewal includes these benefits, regardless of whether a supplemental package is purchased.

* Excludes the development of new integrations, large-scale development projects, and SQL queries.

** **Hours:** MCCi allows clients to use their hours for a multitude of services, as long as a request will not start a service that cannot be completed with the hours available. None of the packages listed above are intended to be utilized for the configuration of a new *complex* business process. In those instances, a separate SOW is required.

SUPPLEMENTAL SUPPORT PACKAGE DESCRIPTIONS

CLIENT RESPONSIBILITIES (ALL PACKAGES)

- For self-hosted (applications hosted by Client) solutions: Configuring/maintaining backups and any general network, security, or operating system settings outside of Client’s solution (Laserfiche, ABBY).
- Managing application-level security.
- Managing and creating retention policies related to Records Management Module.
- Providing an IT contact (internal or third-party) for MCCi to work with as necessary.

- Providing remote access capabilities as needed. If the Client requests MCCi to have unattended access, the Client assumes all responsibility for the related session(s). The Client will work with MCCi to set up user profiles, user tags, etc. to allow desired security rights/access.
- Creating/providing process diagrams (and any other necessary paperwork/examples).

MANAGED SUPPORT SERVICES (MSS)

MCCi’s **MSS** package provides additional training and assistance to the Client’s administrator and users. Pricing for the advanced block of hours is based on MCCi’s Support Technician hourly rate discounted by 10%. The number of hours included is based on active products and will expire on the same date as Client’s annual renewal. **MSS** can be used for the following:

- **ADDITIONAL REMOTE TRAINING**
Additional web-based training is conducted to train new users or as refresher training for existing users.
- **ADDITIONAL SYSTEM SETTINGS CONSULTATION**
MCCi offers additional best practices consultation that includes recommendations for adding additional departments, additional types of indexing, etc.
- **REMOTE IMPLEMENTATION OF VERSION UPDATES**
While Client’s renewal includes version updates, implementation of those updates is sometimes overlooked. With the addition of **MSS**, MCCi is at Client’s service to directly assist with implementing software updates such as minor updates, quick fixes or point releases. Dependent on the complexity and the Client’s specific configurations, major software upgrades may or may not be covered and should be discussed with Client’s Account Management Team.
- **ANNUAL SYSTEM REVIEW & ANALYSIS**
MCCi will access Client’s system to review how Client’s organization uses Client’s solution, to identify potential issues, and to make recommendations for better use of the system. This analysis may be performed annually and is an optional service that will be completed only if requested by the Client.
- **LASERFICHE CERTIFICATIONS**
Priority offering of complimentary Laserfiche certifications, based on availability.
- **LASERFICHE CONFERENCE REGISTRATION**
Priority offering of complimentary Laserfiche Empower registration, based on availability.
- **ABBYY USER, GROUP, IMPORT PROFILE, AND BATCH UPDATES**
MCCi will create or update users or groups, import profiles, or batches within Client’s ABBYY solution.

MANAGED SUPPORT SERVICES LEVEL 2 (MSS 2)

MCCi’s **MSS 2** package provides all the MSS benefits plus is for clients who need additional administration services. **MSS 2** pricing for the advanced block of hours is based on MCCi’s Support Technician II hourly rate discounted by 10%. The number of hours included is based on active products and will expire on the same date as Client’s annual renewal. **MSS 2** can be used for the following:

- **ADMINISTRATION CONFIGURATION SERVICES**
MCCi will assist with administration configuration services, including setting up users, metadata, security, etc.
- **CONFIGURATION AND MAINTENANCE OF BASIC BUSINESS PROCESS**
Utilizing Laserfiche Forms and Workflow, MCCi will assist with the configuration and maintenance of *basic* business processes (see definitions above). Examples include Filing Workflows, simple Forms, or approval/notification workflows that have few routing steps, no integration, and little to no database lookups.
- **CONFIGURATION OF LASERFICHE QUICK FIELDS SESSIONS**
Using Client’s current Quick Fields modules, MCCi will configure Quick Fields sessions, excluding custom scripting, custom calculations, etc.
- **BASIC RECORDS MANAGEMENT MODULE OVERVIEW TRAINING**

MCCi will provide refresher overview training of the records management module. Initial training cannot be performed under this support level.

- **MAINTENANCE OF MIDDLEWARE/CONFIGURABLE INTEGRATIONS**

Does not include maintenance of custom-built integrations, or any item not purchased from MCCi.

- **EDIT ABBYY SCRIPTS, FIELDS, AND TRAINING**

Within Client's ABBYY solution, MCCi will edit export scripts, import from Laserfiche, fields/variables within an existing project, or training.

PROCESS ADMINISTRATION SUPPORT SERVICES (PASS)

MCCi's **PASS** package provides all the MSS 2 benefits, plus access to a dedicated representative and the ability to have recurring calls to discuss Client's current and upcoming projects. **PASS** pricing for the advanced block of hours is based on MCCi's Application Support Analyst hourly rate discounted by 10%. The number of hours included is based on active products and will expire on the same date as Client's annual renewal. **PASS** can be used for the following:

- **DEDICATED LASERFICHE CERTIFIED PROFESSIONAL**

While on MCCi's **MSS 2** level, Client will have access to MCCi's team of Certified Support Professionals; with **PASS** Client will have a representative dedicated to Client's organization.

- **SCHEDULED RECURRING CONSULTATION CALLS**

Upon Client's request, Client's **PASS** representative will schedule recurring calls with Client to discuss Client's current and upcoming projects. This helps us stay on the same page with Client and ensure tasks and project milestones are being completed.

PROCESS ADMINISTRATION SUPPORT SERVICES LEVEL 2 (PASS 2)

PASS 2 includes the benefits of **PASS** and provides the ability for MCCi to maintain complex business processes, which requires knowledge transfer and maintenance of that knowledge. **PASS 2** pricing for the advanced block of hours is based on a flat fee and MCCi's Application Support Analyst hourly rate discounted by 10%. The number of hours included is based on active products and will expire on the same date as Client's annual renewal. **PASS 2** can be used for the following:

- **ANNUAL REVIEW OF BUSINESS PROCESS CONFIGURATIONS**

- **INSTITUTIONAL KNOWLEDGE OF CLIENT SOLUTION**

Turnover within Client's organization can happen, and it's important to have a plan. Who will help Client's new solution administrator get up to speed on Client's processes and solutions in place? Leave that to us. MCCi documents Client's specific organization's usage and implemented business processes, integrations, etc., and are able to assist with the knowledge transfer to the new solution administrator if needed.

- **MAINTENANCE OF MCCI/CLIENT CONFIGURED COMPLEX BUSINESS PROCESSES**

The assigned representative can maintain MCCi or Client configured *complex* business processes. For example, minor tweaks, updates due to upgrades, process improvements, etc.

- **ABILITY TO SCHEDULE AFTER-HOURS MIGRATIONS/UPGRADES**

Avoid MCCi's after-hours premium charge for server migrations and upgrades. **PASS 2** clients can schedule these anytime Monday-Friday from 8 am to 10 pm ET and Saturday and Sunday from 12 pm to 4 pm ET.

- **BASIC JAVASCRIPT, CSS AND CALCULATIONS FOR LASERFICHE FORMS**

Excludes complex scripting.

- **BASIC LASERFICHE WEBLINK/PUBLIC PORTAL CUSTOMIZATION**

MCCi will help customize Client's Weblink/Public Portal to meet Client's needs.

SERVICE LEVEL AGREEMENT (SLA)

MCCi's SLAs are offered as additional options to Client's annual support/subscription. An SLA offers clients escalated response times depending on the severity of the support issue, as well as other additional benefits. The SLA documentation and pricing is readily available upon request. MCCi currently has two separate SLAs available:

- Infrastructure Hosting
- Application Support (Client Self-Hosted)
- Application Support (Cloud Applications)

THE TRAINING CENTER FOR LASERFICHE

MCCi's Training Center for Laserfiche annual subscription provides an easy, cost-effective way for all users in Client's organization to access training videos for Laserfiche and ABBYY.

BENEFITS

- 24/7 access to on-demand Laserfiche training videos and other resources
- Reduction in training expenses
- Caters to all skill levels from Basic Users to Advanced System Administrators
- Unlimited access for Client's entire organization
- User determined schedule and pacing
- Reduction in internal support and increased user productivity
- Increased efficiency through improved internal usage/adoption
- Instant/budgeted training available in the case of employee turnover
- Enhance Client's organization's internal Laserfiche training program

**The Training Center subscription gate is based on Laserfiche user counts*

MANAGED CLOUD OVERVIEW

MCCi Managed Cloud operates cloud infrastructure on your behalf, providing a secure and compliant environment without the worry of day-to-day management. Infrastructure as a Service (IaaS) reduces operational overhead and automates common activities (i.e., change requests, monitoring, patch management, security, and backup services). This service provides a full-lifecycle service to provision, run, and support your infrastructure. Managed Cloud mitigates risk and removes the burden of infrastructure operations so you can direct resources toward differentiating your business.

At MCCi, we understand our clients' needs are always changing. Our Managed Cloud Services team is standing by to engage with you on growth strategies, ongoing support, and future infrastructure needs.

MANAGED CLOUD BENEFITS

- Eases the cloud transformation process by eliminating the learning curve for architecting secure, scalable solutions on a cloud platform
- Provides higher availability with zone-redundant services to protect from single points of failure, reducing unplanned downtime and help desk and system administration time
- Allows for virtually unlimited scaling capability, improving agility in responding to new and ever-changing national and international regulations
- Ensures security and compliance with a FedRAMP Authorized at Level High infrastructure and next-generation firewall with application layer security
- Manages updates and protects your data, including a nightly backup of all application data and databases

For existing clients who have a self-hosted solution that they wish to migrate to MCCi's Managed Cloud, MCCi can handle the data migration for you. Since each client's needs are different, this migration will be quoted separately and not included in our standard packages.

FULLY MANAGED CONFIGURATION AND DEPLOYMENT

Our team of experts will do all the heavy lifting for configuring and deploying your cloud infrastructure. Once deployed, we will provide infrastructure support services for your environment, including:

- Network, security, system, computing resource, and database management
- Application deployment, scaling, and lifecycle management
- Patch management:
 - Monitoring and categorization of new patches and vulnerabilities
 - Client notification of patch related maintenance windows
 - Patch testing and roll-out
 - Auditing and reporting of device compliance
- Backup and restore services
- Operating system and SQL licensing needed for your infrastructure

AZURE GOVERNMENT CLOUD

Microsoft Azure Government Cloud is [FedRAMP Authorized](#) at Level High and handles data subject to certain government regulations and requirements, such as NIST800.171 (DIB), ITAR, IRS 1075, DoD L4, and CJIS. To provide you with a high security and compliance level, Azure Government uses physically isolated datacenters and networks (located in the U.S. only). MCCi has undergone a strict validation of eligibility for deploying in the Azure Government cloud.

MONITORING AND ALERTING WITH 24/7 ON-CALL ESCALATION

Our monitoring and alerting systems allow us to notify you of any issues from our cloud-based Network Operations Center (NOC). Our engineers can handle any cloud infrastructure issues 24/7.

ENCRYPTION

MCCi's Managed Cloud service targets end-to-end encryption, where available. Data disks are implemented using Azure Managed Disks and encrypted at rest with Storage Services Encryption (SSE), which utilizes 256-bit AES encryption. Azure Disk Encryption available upon request. Where available, both front- and back-end data in transit is encrypted using TLS 1.2 or better. Data stored in SQL databases is encrypted using SQL Transparent Data Encryption (TDE).

BACKUPS

MCCi utilizes Azure Backup services to provide independent and isolated backups to guard against accidental destruction of original data. Backups are stored in a Recovery Services Vault with built-in management of recovery points. Using Recovery Services vaults, MCCi can restore files and folders from a VM or the entire VM. MCCi's Azure Backup-based recovery-services offering provides two types of replications to keep your storage/data highly available:

Schedule:

A daily snapshot of all VM OS and attached storage disks

Retention:

MCCi's default retention period for Managed Cloud is ten days. Extended retention-period offerings available (45 days of daily backups, plus one monthly backup for 12 months) and priced separately.

Location:

MCCi's default offering is locally redundant storage (LRS) that replicates your data three times (it creates three copies of your data) in a storage scale unit in a datacenter. All copies of the data exist within the same region. LRS is a low-cost option for protecting your data from local hardware failures.

Enhanced Offerings Available Upon Request:

Geo-redundant storage (GRS) replicates your data to a secondary region (hundreds of miles away from the source data's primary location). GRS costs more than LRS, but GRS provides a higher durability level for your data, even if there's a regional outage.

FIREWALLS

MCCi's Managed Cloud infrastructure utilizes Palo Alto next-generation firewalls that:

- Adhere to the "allow what you want to allow and deny all else" premise and protecting your network with security policies based on the application identity, irrespective of port, protocol, an evasive tactic, or encryption certificate to be used with SSL or TLS
- Inspect the application stream to prevent known threats, such as viruses, vulnerability exploits, botnets and spyware, and unknown threats, such as advanced persistent threats
- Allow us to leverage agile, inline network security and threat prevention to consistently manage and protect our applications hosted within our public cloud virtualized data center environment

IDENTITY MANAGEMENT INTEGRATION

Identity management is the organizational process for identifying, authenticating, and authorizing individuals or groups of people to access applications, systems, or networks by associating user rights and restrictions with established identities. Laserfiche supports several options for federating Identity Management to multiple providers. Depending on whether the system is a new deployment, or an existing deployment migrated to the Managed Cloud, there may be limitations in supported migration options or additional network communications required of the Client's network to support the desired configuration.

ABBYY OVERVIEW

Thousands of organizations globally and more than 50 million people from over 200 countries and regions use ABBYY products, technologies, solutions, and services. ABBYY provides Automation Intelligence (AI)-based solutions and services to one-third of the Forbes 100 companies who actively deploy a new digital workforce consisting of robotic process automation (RPA) software robots to achieve intelligent automation.

ABBYY FLEXICAPTURE FOR INVOICES

ABBYY FlexiCapture for Invoices is a turnkey capture solution that replaces costly manual data entry with efficient automated invoice processing. By enabling early capture of invoices and centralized extraction and validation of data, it reduces the cost of paying an invoice, improves visibility into the payment cycle, and increases analysis and forecasting accuracy. ABBYY's award-winning, AI-driven recognition neural networks, and machine learning technologies provide unparalleled accuracy. FlexiCapture for Invoices can locate invoice data within the most complex documents through multiple approaches of functionality.



Efficiency gains

Realize more than a 400% increase in number of invoices an employee can process manually, and 30% less time responding in inquiries.



Reduced costs

Reduce the costs by 5-10 times compared to manual processing.



Faster cycle time

Decrease invoice cycle time (receipt to payment) to 5 days or shorter, nurture supplier relationships, and take advantage of early payment discounts.

ABBYY FLEXICAPTURE

ABBYY FlexiCapture is an Intelligent Document Processing platform built for the needs of today's complex digital enterprise. ABBYY FlexiCapture intelligently captures, classifies, and transfers critical data from unstructured and structured documents to the right process, workflow, and advanced recognition capabilities by bringing together the best NLP (natural language processing), machine learning, and advanced recognition capabilities or decision engine. ABBYY FlexiCapture automatically processes all types of documents from files and scanners in a single flow, including office documents and image formats, email attachments, and message bodies. Orchestrating the process from acquisition to delivery, FlexiCapture feeds content-driven business applications such as RPA and BPM (business process management), helping organizations focus on customer service, cost reduction, compliance, and competitive advantage.



Faster, straight-through processing

Content from documents entering through any channel, in any format, is automatically extracted, understood, and delivered, removing manual processing friction.



Smooth transactions, smart decisions, rapid action

Leverage customer-provided data to accelerate transactions, make smarter decisions, and provide quick, accurate responses to your customers.



Control, predictability, and compliance

Gain full chain of custody reporting and management for fine-tuning of results, while ensuring end-to-end compliance with your process and security models.

ABBYY DEFINITIONS

FLEXICAPTURE FOR INVOICES

FlexiCapture for Invoices includes:

SUPERIOR QUALITY

The system is already trained with numerous variants of invoices, using neural networks technology, saving Client time and money. When Client begins processing the invoices, there is no need for Client to start with the fine-tuning and training on the samples.

STRAIGHT-THROUGH PROCESSING

Automated document processing from invoice arrival to posting without human intervention enables accounting staff to focus on exceptional invoices only.

BUSINESS-READY

ABBYY FlexiCapture for Invoices offers a quick and easy start to automated invoice processing without a long and cost-intensive deployment cycle. The solution is pre-configured to identify all necessary data fields on invoices and offers essential validation rules.

MULTI-CHANNEL INPUT

ABBYY's invoice solution supports multiple input channels like web-based invoice scanning, email, MFP, FTP, mobile capture, or fax. Capture at the point of entry instead of hand-to-hand paper transfer, enabling instant delivery of invoices into electronic workflows, adding transparency to Client's AP process.

PURCHASE ORDER MATCHING

Automated purchase order matching on header level and validation against ERP master databases decreases time required for manual verification, facilitates data reconciliation, streamlines the invoice processing cycle, and enables straight-through processing for matched documents. The automated matching results can be reviewed and validated by the accountant.

INTUITIVE DATA VERIFICATION

Time spent on invoice reviews and corrections can be reduced to a minimum thanks to an intuitive validation interface, which guides the accountant through the fields that require attention. Smart value suggestions and other useful features facilitate effective data verification.

ARCHIVE-READY

Invoice images are converted to compressed searchable PDF files ready for electronic archiving, which facilitates audits, timely response to internal or external inquiries, and supports compliance with financial document retention regulation.

TIGHT INTEGRATION

Supplied with proven connectors to various ERPs, approval workflows, BPM systems and Laserfiche, the solution can be seamlessly integrated in an existing financial environment.

MACHINE LEARNING BY USER SIDE

While Client uses the solution, it starts learning by feedback on Client's documents and additionally increases extraction quality. The more Client uses the solution, the better quality of results Client gets. Controllable on-the-fly training technology enables immediate data detection refinement directly by an accountant while reviewing the invoice. As opposed to "black-box"-life self-learning systems, ABBYY FlexiCapture for Invoices gives IT staff full control over the training results.

IMAGE ENHANCEMENTS

Enhanced Image pre-processing enables automatic clean-up and enhancement of images arriving from desktop or mobile scanning.

All images go through image enhancement and pre-processing, a process in which scanned images are altered to make them more suitable for analysis and recognition. This process includes operations such as removing noise (e.g., de-speckling), de-skewing (rotate), correct distortions and binarization.

ADVANCED CLASSIFICATION

FlexiCapture offers image, text, or rule-based classification methods that can be combined into a hierarchical system to deliver the greatest straight-through processing performance and reduced manual review. Classification technology detects every incoming document type, including images, by using deep learning Convolutional Neural Networks and then sorts documents by appearance or pattern; and text classification which relies on statistical and semantic text analysis. Use any of these technologies separately or simultaneously to deliver faster response times and prompt decision making. Advanced classification can be used for the whole document flow in order to process not only invoices but the other types of documents within the same processing.

LINE ITEMS SUPPORT*

ABBYY supports table Line Items extraction such as: Article Number, Description, Unit Price, Quantity, TotalPriceNetto, VatCode, Vat Value, Vat Percentage, Total Price Brutto. A table extraction of line items can be performed with or without purchase order data.

*This functionality may vary based on Client's scope of services and may not include all the items above.

SCALABILITY AND ENHANCED PERFORMANCE

FlexiCapture can be scaled both vertically and horizontally when deployed to support high volume and fast document processing scenarios. Whether Client need to process more than three (3) million documents per day or 2,000 pages per minute, the architecture of FlexiCapture can grow to meet Client's processing requirements. One can control multi-server installations, distributed infrastructure, and operators via centralized configuration and management.

MULTI-TENANCY

Create a secured and isolated environment for tenants and apply common policies for different users with the multi-tenancy feature. Use secure, centralized administration tools and separated licenses to protect data across multiple workgroups with less time for set-up. The multi-tenant architecture allows several different groups of users to work within the system while having no access to each other's data and configuration parameters.

DOCUMENT SETS

Many business processes use documents that are all related to one another because they serve some common purpose. In ABBYY FlexiCapture, documents of this sort can be grouped together into document sets.

Multiple linked documents can be processed as one (1) complete case file, with various assembly, processing and validation checks, to improve efficiency in more complex case management scenarios (e.g., customer on-boarding scenarios, mortgage applications, insurance reports, and claims management). These scenarios imply not only document recognition, but also the need to check if all required documents have been provided (completeness check) and that all of them belong to the same case (continuity check), e.g., verify that the person's name is the same in all submitted documents. With the Document sets feature Client can create a table with the similar fields from different invoices to streamline the document processing of the group of similar documents and enable automated expense management for a well-rounded travel policy.

MOBILE CLIENT

Build the right mobile experience and capture workflow on Client's device ensuring the highest level of success and accuracy by leveraging the advanced mobile imaging SDKs of ABBYY. High quality mobile uploads are supported by image enhancement tools. Confirmation reports notify Client when images are uploaded and processed correctly.

SINGLE SIGN-ON

Single sign-on (SSO) enables users to securely authenticate with multiple applications and websites by logging in only once. The most popular identity providers, such as Active Directory, Azure Active Directory, OKTA, and OneLogin, are supported out-of-the-box.

COMMAND LINE INTERFACE (CLI)

With Command Line Interface (CLI), Client can easily administrate distributed environments when Client need to setup or synchronize different product installations, reuse the result of machine learning for all projects, backup or restore existing projects.

EXPORT FILE FORMATS

Data export formats: XLS, DBF, CSV, TXT, XML

Image export formats: TIFF, JPEG, PDF, PDF/A (Standard allows Client to select the version of the format standard. By default, the version of the standard is detected automatically. For PDF/A the following standard versions are currently available: 1a, 1b, 2a, 2b, 2u, 3a, 3b, 3u), BMP, JPEG2000, PCX packbits, PNG.

FLEXICAPTURE

FlexiCapture includes:

AUTO-LEARNING

The new auto-learning capabilities help accelerate time to production and significantly reduce ongoing system support and maintenance costs. The technology helps users to train the system to process flexible or irregular document layouts while the administrator retains full control to edit, fine-tune, or discard auto-learning results. The system continuously learns and improves based on feedback from users leveraging ABBYY advanced machine learning and Natural Language Processing.

ADVANCED DOCUMENT CLASSIFICATION

Inbound communication can be classified by form and content to optimize Client's organization's information-driven processes. Classification technology detects every incoming document type, including images, by using deep learning Convolutional Neural Networks and then sorts documents by appearance or pattern, and text classification which relies on statistical and semantic text analysis.

SCALABILITY AND ENHANCED PERFORMANCE

FlexiCapture can be scaled both vertically and horizontally when deployed to support high volume and fast document processing scenarios. Whether Client need to process more than three (3) million documents per day or 2,000 pages per minute, the architecture of FlexiCapture can grow to meet Client's processing requirements. One can control multi-server installations, distributed infrastructure, and operators via centralized configuration and management.

MULTI-TENANCY

Create a secured and isolated environment for tenants and apply common policies for different users with the multi-tenancy feature. Use secure, centralized administration tools and separated licenses to protect data across multiple workgroups with less time for set-up.

SINGLE SOLUTION FOR ALL DOCUMENT TYPES

By using sophisticated document analysis, FlexiCapture is able to detect the exact type of paper or digital documents (spreadsheets, images, logos, etc.) and different areas within a document, even when text appears unreadable. Word, Excel, PDF, email bodies, scanned images, and other digital documents can be processed in the same flow.

IMAGE ENHANCEMENTS

ABBYY Image Enhancement automatically improves images captured by mobile devices to optimize processing. It is also indispensable for processing documents with complex backgrounds like transcripts, identification documents, and transportation forms, while automatically optimizing the image for processing or providing immediate feedback

if the image quality is poor. Features such as auto crop, background whitening, image quality assessment and capability to create custom enhancement profiles for different image sources, help process all documents regardless of their quality or source.

MULTI-LEVEL DATA PROTECTION

Various confidential data within documents can be hidden using different methods during exchange and verification by operators with different access rights. HTTPS provides bidirectional encryption between a user and a server to protect against data interception and tampering attacks.

ADVANCED MONITORING AND ANALYTICS TOOLS

Tools help Client analyzes document processing flow, ensure continuity of business process, and optimize and prioritize resources to tune performance and eliminate bottlenecks.

EASY ADMINISTRATION

With new Command Line Interface (CLI), Client can easily administrate distributed environments when Client need to setup or synchronize different product installations, reuse the result of Machine learning for all projects, or backup or restore existing projects.

SMOOTH INTEGRATION

Default connectors for Blue Prism, Laserfiche and other systems are available.

MULTI-CHANNEL DATA ENTRY

Multi-channel data entry enables Client to process both paper and digital documents coming from multiple sources in a single flow, including MFPs, network scanners, emails, FTP, web post or hot folders and mobile devices.

MOBILE CAPTURE

Increase data availability and processing speed using mobile devices and other document sources for data entry. High quality mobile uploads are supported by image enhancement tools. Confirmation reports notify Client when images are uploaded and processed correctly. Build the right mobile experience and capture workflow on Client's device ensuring the highest level of success and accuracy by leveraging the advanced mobile imaging SDKs of ABBYY.

ONESPAN OVERVIEW

The world has gone digital, and it's not simply a question of doing business better, faster, and cheaper. Most businesses and government organizations move toward end-to-end digital business processes to improve customer experience by shifting away from paper and adopting electronic signatures. OneSpan Sign is an e-signature tool that provides you a legal, secure way to achieve digital signatures.

OneSpan Sign helps you:

- Ensure high user adoption and satisfaction with the most seamless, white-labeled e-signing experience
- Protect your users and documents against fraud with military-grade digital signature technology
- Strengthen your compliance and deter legal disputes with the most comprehensive audit trails in the market
- Scale electronic signatures across your organization and channels quickly and cost-effectively
- Get a cost-effective solution regardless of your volumes
- Eliminate time-consuming errors, such as missing signatures and data
- Cut costs by eliminating the need to prepare manually, ship, and archive paper-document packages
- Integrate with other third-party applications with an open API, fully supported SDKs, and connectors with Laserfiche, Salesforce, Office365, and more

DOCUMENT SECURITY

OneSpan Sign supports a broad range of options to verify signers' identities before giving them access to documents. All OneSpan Sign plans include Email, SMS PIN code, and Q&A. Unlike most e-signature solutions, OneSpan Sign uses digital signature technology to tamper-seal documents after *each* signer. It invalidates any changes made to the documents. This built-in security ensures the integrity of the e-signed document.

COMPREHENSIVE AUDIT TRAILS

OneSpan Sign makes it easy to access details about the transaction to prove compliance. Audit trails permanently embed within the e-signed document for easy, one-click verification. This is also the only e-signature solution on the market to capture a visual audit trail of how the signing process took place (as experienced by the signers).

The diagram illustrates three methods of e-signing and their resulting document appearance:

- Click-to-sign method:** A customer signs online from anywhere using a laptop. The resulting document shows the signature as "E-SIGNED by J.Smith on 2018-03-15 16:56:16 GMT".
- Personal mobile device:** A customer signs on their own personal mobile device. The resulting document shows the signature as a handwritten-style "John Smith".
- E-signing in person:** A customer signs in person. The resulting document shows the signature as a handwritten-style "John Smith" with a watermark behind it.

Additional text for the click-to-sign method: "Customers need nothing more than a web browser to 'click-to-sign' from home. Their signature will appear typed out in a standard font."

Additional text for the in-person method: "The bank can choose to display a watermark behind the signature, or additional information such as a date stamp."

JUSTFOIA OVERVIEW

Records request challenges continue to increase, and the call for transparency is at an all-time high. Organizations are selecting JustFOIA to bridge the transparency gap with their community to create an environment of trust and accountability. JustFOIA licenses a software as a service solution (the "Solution"), which is the **easiest-to-use records requests software** that manages every step of the process from intake to delivery. Our Solution can help you save valuable time through automating repetitive tasks, such as redactions, assignments, reminders, and communication with requesters and responders. It is now essential to leverage technology to streamline your records requests process.

JUSTFOIA DEFINITIONS

JUSTFOIA

Records request challenges continue to increase, and the call for transparency is at an all-time high. Organizations are selecting JustFOIA to bridge the transparency gap with their community to create an environment of trust and accountability. JustFOIA licenses a software as a service solution (the "Solution"), which is the **easiest-to-use records requests software** that manages every step of the process from intake to delivery. Our Solution can help you save valuable time through automating repetitive tasks, such as redactions, assignments, reminders, and communication with requesters and responders. It is now essential to leverage technology to streamline your records requests process.

REDACTION MODULE

Our powerful integrated Redaction Module allows you to upload and redact documents in the Solution. Automatically redact documents with one click or manually remove sensitive data. Features include text search, pattern matching, proximity search, redact selected text and/or full page(s). Easily apply exemption codes to cite redaction reasons. Once redaction is applied, the redacted areas are burnt into the document and cannot be recovered or removed and only the redacted version of the document can be released. There is no per-user fee, so any permitted user can redact a document.

JUSTFOIA TRAINING CENTER

The JustFOIA Training Center is a robust Learning Management System that offers remote learning, ongoing training, and certification, as well as enhanced rollouts of new features and functionality. It is subscribed to by most customers and provides an easy, cost-effective way for all users in Customer's organization to access training videos and certification courses. Benefits include:

- 24/7 access to on-demand JustFOIA training videos and other resources
- Reduce training time and expenses
- Caters to all skill levels from Basic Users to System Administrators
- Unlimited access for Customer's entire organization
- JustFOIA Certifications Courses
- Reduction in internal support and increased user productivity
- Increased efficiency through improved internal usage/adoption of JustFOIA
- Instant/budgeted customized training available in the case of employee turnover
- Customized with fully indexed, recorded training sessions

ADVANCED REPORTING

The Advanced Reporting module will allow Customer to select any piece of their data to create custom reports and includes the following:

- User-selectable data points
- User-defined date ranges
- Email distribution of reports

- Automated scheduling of reports
- Saving created reports
- Ability to export data
- Simplify capture JLARC reporting requirements for Washington customers

SINGLE SIGN-ON (SSO)

The JustFOIA authentication system enables Single Sign-On (“SSO”) integration by allowing connection to one of many supported identity providers. This allows users to login to JustFOIA via trusted connections established with their IT infrastructure (e.g., Azure Active Directory login) instead of using username and password authentication within JustFOIA. This feature eliminates the need for users to maintain two sets of credentials, is easier for a customer’s IT organization to maintain security protocols and gives the customers better control over managing user access.

The following types of enterprise connections can be made:

- Azure Active Directory
- ADFS
- Active Directory / LDAP
- Google Workspace (formerly G Suite, formerly Google Apps)
- Open ID Connect
- SAML
- PingFederate

PAYMENT PORTAL

JustFOIA integrates with Authorize.net, PayPal and NCR/JetPay to collect payments from requestors online. These third-party payment processors handle all monetary transactions and sensitive credit card data. The requestor enters the request number/security key to see any fees that they owe. If they owe fees, they can pay through a secure Authorize.net, PayPal or NCR/JetPay site. Once they pay, users are able to make the request documents available for immediate release.

ADOBE ACROBAT PRO PLUG-IN

Adobe Acrobat Pro Plug-in allows customers to easily upload documents they are working on in Adobe Acrobat Pro to a specific request. In Adobe Acrobat Pro, simply create and edit documents, as well as apply redactions and other features available in the Adobe Pro software. Once the document has been finalized, a simple click of the JustFOIA Plug-In button sends the document to the customer’s JustFOIA system. It’s as easy as picking the desired request number and the is in the Response Docs section, ready to send to the requester. In order to utilize this plug-in, organizations will need to have an active Adobe Acrobat Pro license.

LASERFICHE INTEGRATION

Our exclusive Laserfiche integration is a seamless bridge, allowing your organization to leverage Laserfiche to more quickly and efficiently fulfill records requests. From inside the JustFOIA Solution, users can securely connect to their Laserfiche repository to search and browse for responsive documents. Alternatively, users can search, edit, and redact in Laserfiche, then click to send selected documents as responsive documents to a specific request. As part of your Laserfiche Integration, you can also export custom system reports directly into your Laserfiche repository, as well as all parts of a request from communication to provided documents to invoices and a full timeline history of activity on the request. In order to utilize this integration, each user will need a full Laserfiche license. Please see the Laserfiche Expansion Configuration Guide for Installation Requirements and Prerequisites.

ANY & ALL DOCUMENT MANAGEMENT

For customers who receive requests for “Any and All” communications, the effort to determine the responsive documents can be overwhelming. Built for customers who need to work with a large number of files, JustFOIA’s Any & All Document Management tool helps simplify and speed up this process with a variety of features, including:

- Extract .PST files (emails and attachments)
- Detect duplicate emails
- Bulk redact and sort all files with one-click
- Combine files into one PDF
- Create custom folders and review documents in the document viewer

CUSTOM WORKFLOWS

Building on the capability to design lists of tasks and set defaults, a Custom Workflow leverages automation to save your organization time by routing certain types of requests from submission to completion.

Automatically run when a request comes in, a Custom Workflow can use the supplied form data to determine which departments and tasks get assigned. Best suited for organizations that process larger volumes of specific types of requests. Also available is the full use of due dates, reminders, escalations, and approvals as well as the capability to automatically send out system and custom emails triggered by events in the workflow.

We work with you to design the unique series of tasks to assign out to departments so you can handle the approvals while keeping the request moving through your Solution.

TAB 9 - REQUIRED DOCUMENTS

FEDERAL FUNDS CERTIFICATIONS

Participating Agencies may elect to use federal funds to purchase under the Master Agreement. The following certifications and provisions may be required and apply when a Participating Agency expends federal funds for any purchase resulting from this procurement process. Pursuant to 2 C.F.R. § 200.326, all contracts, including small purchases, awarded by the Participating Agency and the Participating Agency's subcontractors shall contain the procurement provisions of Appendix II to Part 200, as applicable.

APPENDIX II TO 2 CFR PART 200

(A) Contracts for more than the simplified acquisition threshold currently set at \$250,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

- Pursuant to Federal Rule (A) above, when a Participating Agency expends federal funds, the Participating Agency and Offeror reserves all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party.

(B) Termination for cause and for convenience by the grantee or subgrantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of \$10,000)

- Pursuant to Federal Rule (B) above, when a Participating Agency expends federal funds, the Participating Agency reserves the right to terminate any agreement in excess of \$10,000 resulting from this procurement process in the event of a breach or default of the agreement by Offeror as detailed in the terms of the contract

(C) Equal Employment Opportunity. Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 CFR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

- Pursuant to Federal Rule (C) above, when a Participating Agency expends federal funds on any federally assisted construction contract, the equal opportunity clause is incorporated by reference herein.

(D) Davis-Bacon Act, as amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay

wages not less than once a week. The non-Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

- Pursuant to Federal Rule (D) above, when a Participating Agency expends federal funds during the term of an award for all contracts and subgrants for construction or repair, offeror will be in compliance with all applicable Davis-Bacon Act provisions
- Any Participating Agency will include any current and applicable prevailing wage determination in each issued solicitation and provide Offeror with any required documentation and/or forms that must be completed by Offeror to remain in compliance the applicable Davis-Bacon Act provisions.

(E) Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708). Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

- Pursuant to Federal Rule (E) above, when a Participating Agency expends federal funds, offeror certifies that offeror will be in compliance with all applicable provisions of the Contract Work Hours and Safety Standards Act during the term of an award for all contracts by Participating Agency resulting from this procurement process.

(F) Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.

- Pursuant to Federal Rule (F) above, when federal funds are expended by Participating Agency, the offeror certifies that during the term of an award for all contracts by Participating Agency resulting from this procurement process, the offeror agrees to comply with all applicable requirements as referenced in Federal Rule (F) above

(G) Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended— Contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the non- Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

- Pursuant to Federal Rule (G) above, when federal funds are expended by Participating Agency, the offeror certifies that during the term of an award for all contracts by Participating Agency member resulting from this procurement process, the offeror agrees to comply with all applicable requirements as referenced in Federal Rule (G) above

(H) Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

- Pursuant to Federal Rule (H) above, when federal funds are expended by Participating Agency, the offeror certifies that during the term of an award for all contracts by Participating Agency resulting from this procurement process, the offeror certifies that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency. If at any time during the term of an award the offeror or its principals becomes debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency, the offeror will notify the Participating Agency

(I) Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)—Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

- Pursuant to Federal Rule (I) above, when federal funds are expended by Participating Agency, the offeror certifies that during the term and after the awarded term of an award for all contracts by Participating Agency resulting from this procurement process, the

offeror certifies that it is in compliance with all applicable provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). The undersigned further certifies that:

- No Federal appropriated funds have been paid or will be paid for on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.
- If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions.
- The undersigned shall require that the language of this certification be included in the award documents for all covered sub-awards exceeding \$100,000 in Federal funds at all appropriate tiers and all subrecipients shall certify and disclose accordingly.

RECORD RETENTION REQUIREMENTS FOR CONTRACTS INVOLVING FEDERAL FUNDS

When federal funds are expended by Participating Agency for any contract resulting from this procurement process, offeror certifies that it will comply with the record retention requirements detailed in 2 CFR § 200.334. The offeror further certifies that offeror will retain all records as required by 2 CFR § 200.334 for a period of three years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

CERTIFICATION OF COMPLIANCE WITH THE ENERGY POLICY AND CONSERVATION ACT

When Participating Agency expends federal funds for any contract resulting from this procurement process, offeror certifies that it will comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C. 6321 et seq.; 49 C.F.R. Part 18).

CERTIFICATION OF COMPLIANCE WITH BUY AMERICA PROVISIONS

To the extent purchases are made with Federal Highway Administration, Federal Railroad Administration, or Federal Transit Administration funds, offeror certifies that its products comply with all applicable provisions of the Buy America Act and agrees to provide such certification or applicable waiver with respect to specific products to any Participating Agency upon request. Participating Agencies will clearly identify whether Buy America Provisions apply in any issued solicitation. Purchases made in accordance with the Buy America Act must still follow the applicable procurement rules calling for free and open competition.

CERTIFICATION OF ACCESS TO RECORDS

Offeror agrees that the Inspector General of the Agency or any of their duly authorized representatives shall have access to any non-financial documents, papers, or other records of offeror that are pertinent to offeror's discharge of its obligations under the Contract for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to offeror's personnel for the purpose of interview and discussion relating to such documents. This right of access will last only as long as the records are retained.

CERTIFICATION OF APPLICABILITY TO SUBCONTRACTORS

Offeror agrees that all contracts it awards pursuant to the Contract shall be bound by the foregoing terms and conditions.

CLEAN AIR AND WATER ACT AND DEBARMENT NOTICE

By the signature below (Under Federal Required Signatures), I, the Vendor, am in compliance with all applicable standards, orders or regulations issued pursuant to the Clean Air Act of 1970, as Amended (42 U.S. C. 1857 (h), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 117389 and Environmental Protection Agency Regulation, 40 CFR Part 15 as required under OMB Circular A-102, Attachment O, Paragraph 14 (1) regarding reporting violations to the grantor agency and to the United States Environment Protection Agency Assistant Administrator for the Enforcement.

I hereby further certify that my company has not been debarred, suspended or otherwise ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension", as described in the Federal Register and Rules and Regulations.

CONTRACTOR REQUIREMENTS

Contractor Certification

Contractor's Employment Eligibility

By entering the contract, Contractor warrants compliance with the Federal Immigration and Nationality Act (FINA), and all other federal and state immigration laws and regulations. The Contractor further warrants that it is in compliance with the various state statutes of the states it is will operate this contract in.

Participating Government Entities including School Districts may request verification of compliance from any Contractor or subcontractor performing work under this Contract. These Entities reserve the right to confirm compliance in accordance with applicable laws.

Should the Participating Entities suspect or find that the Contractor or any of its subcontractors are not in compliance, they may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Contract for default, and suspension and/or debarment of the Contractor. All costs necessary to verify compliance are the responsibility of the Contractor.

The offeror complies and maintains compliance with the appropriate statutes which requires compliance with federal immigration laws by State employers, State contractors and State subcontractors in accordance with the E-Verify Employee Eligibility Verification Program.

Contractor shall comply with governing board policy of the NCPA Participating entities in which work is being performed.

Fingerprint & Background Checks

If required to provide services on school district property at least five (5) times during a month, contractor shall submit a full set of fingerprints to the school district if requested of each person or employee who may provide such service. Alternately, the school district may fingerprint those persons or employees. An exception to this requirement may be made as authorized in Governing Board policy. The district shall conduct a fingerprint check in accordance with the appropriate state and federal laws of all contractors, subcontractors or vendors and their employees for which fingerprints are submitted to the district. Contractor, subcontractors, vendors and their employees shall not provide services on school district properties until authorized by the District.

The offeror shall comply with fingerprinting requirements in accordance with appropriate statutes in the state in which the work is being performed unless otherwise exempted.

Contractor shall comply with governing board policy in the school district or Participating Entity in which work is being performed.

Business Operations in Sudan, Iran

In accordance with A.R.S. 35-391 and A.R.S. 35-393, the Contractor hereby certifies that the contractor does not have scrutinized business operations in Sudan and/or Iran.

REQUIRED CLAUSES FOR FEDERAL ASSISTANCE PROVIDED BY FTA

ACCESS TO RECORDS AND REPORTS

Contractor agrees to:

- a) Maintain all non-financial books, records, accounts and reports required under this Contract for a period of not less than two (2) years after the date of termination or expiration of this Contract or any extensions thereof except in the event of litigation or settlement of claims arising from the performance of this Contract, in which case Contractor agrees to maintain same until the FTA Administrator, the U.S. DOT Office of the Inspector General, the Comptroller General, or any of their duly authorized representatives, have disposed of all such litigation, appeals, claims or exceptions related thereto.
- b) Permit any of the foregoing parties to inspect all non-financial work, materials, and other data and records that pertain to the Project, and to audit the non-financial books, records, and accounts that pertain to the Project and to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed for the purpose of audit and examination. The right of access detailed in this section continues only as long as the records are retained.

FTA does not require the inclusion of these requirements of Article 1.01 in subcontracts.

CIVIL RIGHTS / TITLE VI REQUIREMENTS

- 1) Non-discrimination. In accordance with Title VI of the Civil Rights Act of 1964, as amended, 42 U.S.C. § 2000d, Section 303 of the Age Discrimination Act of 1975, as amended, 42 U.S.C. § 6102, Section 202 of the Americans with Disabilities Act of 1990, as amended, 42 U.S.C. § 12132, and Federal Transit Law at 49 U.S.C. § 5332, Contractor or subcontractor agrees that it will not discriminate against any employee or applicant for employment because of race, color, creed, national origin, sex, marital status age, or disability. In addition, Contractor agrees to comply with applicable Federal implementing regulations and other applicable implementing requirements FTA may issue that are flowed to Contractor from Awarding Participating Agency.
- 2) Equal Employment Opportunity. The following Equal Employment Opportunity requirements apply to this Contract:
 - a. Race, Color, Creed, National Origin, Sex. In accordance with Title VII of the Civil Rights Act, as amended, 42 U.S.C. § 2000e, and Federal Transit Law at 49 U.S.C. § 5332, the Contractor agrees to comply with all applicable Equal Employment Opportunity requirements of U.S. Dept. of Labor regulations, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor, 41 CFR, Parts 60 *et seq.*", and with any applicable Federal statutes, executive orders, regulations, and Federal policies that may affect construction activities undertaken in the course of this Project. Contractor agrees

to take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, creed, national origin, sex, marital status, or age. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation; and selection for training, including apprenticeship. In addition, Contractor agrees to comply with any implementing requirements FTA may issue that are flowed to Contractor from Awarding Participating Agency.

- b. Age. In accordance with the Age Discrimination in Employment Act (ADEA) of 1967, as amended, 29 U.S.C. Sections 621 through 634, and Equal Employment Opportunity Commission (EEOC) implementing regulations, "Age Discrimination in Employment Act", 29 CFR Part 1625, prohibit employment discrimination by Contractor against individuals on the basis of age, including present and prospective employees. In addition, Contractor agrees to comply with any implementing requirements FTA may issue that are flowed to Contractor from Awarding Participating Agency.
 - c. Disabilities. In accordance with Section 102 of the Americans with Disabilities Act of 1990, as amended (ADA), 42 U.S.C. Sections 12101 *et seq.*, prohibits discrimination against qualified individuals with disabilities in programs, activities, and services, and imposes specific requirements on public and private entities. Contractor agrees that it will comply with the requirements of the Equal Employment Opportunity Commission (EEOC), "Regulations to Implement the Equal Employment Provisions of the Americans with Disabilities Act," 29 CFR, Part 1630, pertaining to employment of persons with disabilities and with their responsibilities under Titles I through V of the ADA in employment, public services, public accommodations, telecommunications, and other provisions.
 - d. Segregated Facilities. Contractor certifies that their company does not and will not maintain or provide for their employees any segregated facilities at any of their establishments, and that they do not and will not permit their employees to perform their services at any location under the Contractor's control where segregated facilities are maintained. As used in this certification the term "segregated facilities" means any waiting rooms, work areas, restrooms and washrooms, restaurants and other eating areas, parking lots, drinking fountains, recreation or entertainment areas, transportation, and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, color, religion or national origin because of habit, local custom, or otherwise. Contractor agrees that a breach of this certification will be a violation of this Civil Rights clause.
- 3) Solicitations for Subcontracts, Including Procurements of Materials and Equipment. In all solicitations, either by competitive bidding or negotiation, made by Contractor for work to be performed under a subcontract, including procurements of materials or leases of equipment, each potential subcontractor or supplier shall be notified by Contractor of Contractor's obligations under this Contract and the regulations relative to non-discrimination on the grounds of race, color, creed, sex, disability, age or national origin.

- 4) Sanctions of Non-Compliance. In the event of Contractor's non-compliance with the non-discrimination provisions of this Contract, Public Agency shall impose such Contract sanctions as it or the FTA may determine to be appropriate, including, but not limited to: 1) Withholding of payments to Contractor under the Contract until Contractor complies, and/or; 2) Cancellation, termination or suspension of the Contract, in whole or in part.

Contractor agrees to include the requirements of this clause in each subcontract financed in whole or in part with Federal assistance provided by FTA, modified only if necessary to identify the affected parties.

DISADVANTAGED BUSINESS PARTICIPATION

This Contract is subject to the requirements of Title 49, Code of Federal Regulations, Part 26, "Participation by Disadvantaged Business Enterprises in Department of Transportation Financial Assistance Programs", therefore, it is the policy of the Department of Transportation (DOT) to ensure that Disadvantaged Business Enterprises (DBEs), as defined in 49 CFR Part 26, have an equal opportunity to receive and participate in the performance of DOT-assisted contracts.

- 1) Non-Discrimination Assurances. Contractor or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this Contract. Contractor shall carry out all applicable requirements of 49 CFR Part 26 in the award and administration of DOT-assisted contracts. Failure by Contractor to carry out these requirements is a material breach of this Contract, which may result in the termination of this Contract or other such remedy as public agency deems appropriate. Each subcontract Contractor signs with a subcontractor must include the assurance in this paragraph. (See 49 CFR 26.13(b)).
- 2) Prompt Payment. Contractor is required to pay each subcontractor performing Work under this prime Contract for satisfactory performance of that work no later than thirty (30) days after Contractor's receipt of payment for that Work from public agency. In addition, Contractor is required to return any retainage payments to those subcontractors within thirty (30) days after the subcontractor's work related to this Contract is satisfactorily completed and any liens have been secured. Any delay or postponement of payment from the above time frames may occur only for good cause following written approval of public agency. This clause applies to both DBE and non-DBE subcontractors. Contractor must promptly notify public agency whenever a DBE subcontractor performing Work related to this Contract is terminated or fails to complete its Work, and must make good faith efforts to engage another DBE subcontractor to perform at least the same amount of work. Contractor may not terminate any DBE subcontractor and perform that Work through its own forces, or those of an affiliate, without prior written consent of public agency.
- 3) DBE Program. In connection with the performance of this Contract, Contractor will cooperate with public agency in meeting its commitments and goals to ensure that DBEs shall have the maximum practicable opportunity to compete for subcontract work, regardless of whether a contract goal is set for this Contract. Contractor agrees to use good faith efforts to carry out a policy in the award of its subcontracts, agent agreements, and procurement contracts which will, to the fullest extent, utilize DBEs consistent with the efficient performance of the Contract.

ENERGY CONSERVATION REQUIREMENTS

Contractor agrees to comply with mandatory standards and policies relating to energy efficiency which are contained in the State energy conservation plans issued under the Energy Policy and Conservation Act, as amended, 42 U.S.C. Sections 6321 *et seq.* and 41 CFR Part 301-10.

FEDERAL CHANGES

Contractor shall at all times comply with all applicable FTA regulations, policies, procedures and directives, listed directly or by reference in the Contract between Public Agency and the FTA, and those applicable regulatory and procedural updates that are communicated to Contractor by Public Agency, as they may be amended or promulgated from time to time during the term of this contract. Contractor's failure to so comply shall constitute a material breach of this Contract.

INCORPORATION OF FEDERAL TRANSIT ADMINISTRATION (FTA) TERMS

The provisions include, in part, certain Standard Terms and Conditions required by the U.S. Department of Transportation (DOT), whether or not expressly set forth in the preceding Contract provisions. All contractual provisions required by the DOT and applicable to the scope of a particular Contract awarded to Contractor by a Public Agency as a result of solicitation, as set forth in the most current FTA Circular 4220.1F, published February 8th, 2016, are hereby incorporated by reference. Anything to the contrary herein notwithstanding, all FTA mandated terms shall be deemed to control in the event of a conflict with other provisions contained in this Contract. Contractor agrees not to knowingly perform any act, knowingly fail to perform any act, or refuse to comply with any reasonable public agency requests that would directly cause public agency to be in violation of the FTA terms and conditions.

NO FEDERAL GOVERNMENT OBLIGATIONS TO THIRD PARTIES

Agency and Contractor acknowledge and agree that, absent the Federal Government's express written consent and notwithstanding any concurrence by the Federal Government in or approval of the solicitation or award of the underlying Contract, the Federal Government is not a party to this Contract and shall not be subject to any obligations or liabilities to agency, Contractor, or any other party (whether or not a party to that contract) pertaining to any matter resulting from the underlying Contract.

Contractor agrees to include the above clause in each subcontract financed in whole or in part with federal assistance provided by the FTA. It is further agreed that the clause shall not be modified, except to identify the subcontractor who will be subject to its provisions.

PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS

Contractor acknowledges that the provisions of the Program Fraud Civil Remedies Act of 1986, as amended, 31 U.S.C. §§ 3801 *et seq.* and U.S. DOT regulations, "Program Fraud Civil Remedies," 49 CFR Part 31, apply to its actions pertaining to this Contract. Upon execution of the underlying Contract, Contractor certifies or affirms, to the best of its knowledge, the truthfulness and accuracy of any statement it has made, it makes, it may make, or causes to be

made, pertaining to the underlying Contract or the FTA assisted project for which this Contract Work is being performed.

In addition to other penalties that may be applicable, Contractor further acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification, the Federal Government reserves the right to impose the penalties of the Program Fraud Civil Remedies Act of 1986 on Contractor to the extent the Federal Government deems appropriate.

Contractor also acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification to the Federal Government under a contract connected with a project that is financed in whole or in part with Federal assistance originally awarded by FTA under the authority of 49 U.S.C. § 5307, the Government reserves the right to impose the penalties of 18 U.S.C. § 1001 and 49 U.S.C. § 5307 (n)(1) on the Contractor, to the extent the Federal Government deems appropriate.

Contractor agrees to include the above clauses in each subcontract financed in whole or in part with Federal assistance provided by FTA. It is further agreed that the clauses shall not be modified, except to identify the subcontractor who will be subject to the provisions.

FEDERAL REQUIRED SIGNATURES

Offeror certifies compliance with all provisions, laws, acts, regulations, etc. as specifically noted in the pages above. It is further acknowledged that offeror agrees to comply with all federal, state, and local laws, rules, regulations and ordinances as applicable.

Offeror Donny Barstow

Address 3717 Apalachee Parkway, Suite 201

City/State/Zip Tallahassee FL 32311

Authorized Signature E-SIGNED by Donny Barstow
on 2022-10-24 17:59:15 GMT

Date **October 24, 2022**

ANTITRUST CERTIFICATION STATEMENTS TEXAS GOVERNMENT CODE § 2155.005

I affirm under penalty of perjury of the laws of the State of Texas that:

(1) I am duly authorized to execute this contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Company) listed below;

(2) In connection with this bid, neither I nor any representative of the Company has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15;

(3) In connection with this bid, neither I nor any representative of the Company has violated any federal antitrust law; and

(4) Neither I nor any representative of the Company has directly or indirectly communicated any of the contents of this bid to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.

Company Name **MCCi, LLC**

Address **3717 Apalachee Parkway, Suite 201**

City/State/Zip **Tallahssee, Florida 32311**


Telephone Number **(850) 701-0725**

Fax Number **(850) 564-7496**

Email Address **dwb@mccinnovations.com**

Printed Name **Donald Barstow**

Title **President and CEO**

Authorized Signature  E-SIGNED by Donny Barstow
on 2022-10-21 11:59:20 GMT

STATE NOTICE ADDENDUM

The National Cooperative Purchasing Alliance (NCPA), on behalf of NCPA and its current and potential participants to include all county, city, special district, local government, school district, private K-12 school, higher education institution, state, tribal government, other government agency, healthcare organization, nonprofit organization and all other Public Agencies located nationally in all fifty states, issues this Request for Proposal (RFP) to result in a national contract.

For your reference, the links below include some, but not all, of the entities included in this proposal:

http://www.usa.gov/Agencies/State_and_Territories.shtml

<https://www.usa.gov/local-governments>

ABBYY

890 Hillview Court, Suite 300,
Milpitas, CA 95035, USA
Phone: +1 408 457 9777
Fax: +1 408 457 9778
sales@abbyyusa.com
www.abbyy.com

01.11.2022

To whom it may concern,

Please note that MCCI, is a certified Abby Elite Partner in good standing. MCCI is fully certified and authorized to sell and support the ABBYY product line.

Sincerely,

DocuSigned by:
Butch Reh, President ABBYY USA Software House, Inc
C9AD4DF5557B455...

November 1, 2022



Re: Confirmation of OneSpan Authorized Reseller Status

November 14, 2022
Illinois

Chicago,

To whom It May Concern,

We confirm that **MCCi, LLC**, located at 3717 Apalachee Parkway, Suite 201 Tallahassee, FL 32311 is an authorized OneSpan reseller in the territory of North America under a Non-Exclusive Reseller Agreement, executed between Raya and OneSpan on June 5th, 2020 (“Reseller Agreement”).

OneSpan agrees that **MCCi, LLC** presents the OneSpan commercial offer, enters into business negotiations, and to signs a contract for its own account in response to any Requests for Proposals or Information (RFPs or RFIs) within the cited territory, for the OneSpan hardware and software products as well as Professional Services, that OneSpan develops and supplies. The above activities of **MCCi, LLC** are subject to the terms and conditions of the Reseller Agreement.

This confirmation is issued upon request of Raya in order to confirm **MCCi, LLC** status as reseller only. It may not be used for any other purpose, such as claims or legal proceedings against OneSpan and no third-party rights can be derived from it by any other person or entity.

Sincerely,

Clara Lee
Channel Manager North America
Clara.lee@onespan.com



OneSpan Middle East FZE
Dubai Silicon Oasis HQ Building, B Wing,
Office B609 P.O.Box: 341093, Dubai
United Arab Emirates