

# Proposal

HOLLYWOOD, FL

Upgrade to Rio

Issued:

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*Valid for 30 Days*





# DIGITAL TRANSFORMATION, SIMPLIFIED.




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Dear Mr. Seecharan,

Thank you for your interest in MCCI's solutions. Based on our discussion, we are pleased to enclose our Proposal. While reviewing our proposal, please keep in mind the following advantages of being a client:

**Digital Transformation** - MCCI is your partner, not just another vendor as we embark on your digital transformation journey. We are committed to building a solution to grow in your organization, further streamline processes and eliminate bottlenecks.

**Full Portfolio of Solutions** - MCCI has a suite of solutions focused on helping organizations automate their business processes and streamline operations. We have picked the top technology for Content Services and Intelligent Automation. These technologies include Laserfiche, ABBYY and Blue Prism. We are a top solution provider including the largest Laserfiche Solution Provider in the world.

**Industry Experts** - With over 150 years of combined experience, MCCI's staff of industry-expert, certified professional services team members are committed to making sure your implementation is a success. A key to this success is proper planning. Your assigned Project Manager will perform a pre-installation meeting to introduce our team, review your priorities, confirm server/network requirements, and setup remote access as needed to perform the installation and configuration processes.

Sincerely,

**Bryan Frick**  
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## PROPOSED SOLUTION: LASERFICHE

The following Laserfiche solution has been included with your proposed solution:

### LASERFICHE RIO

MCCi is recommending the Rio Enterprise platform for your organization. Laserfiche Rio seamlessly combines traditional content services platform (CSP) functionality with powerful business process management, auditing tools, and security. This platform is designed for clients like you, who **innovate and evolve** with changing technologies, **digitally transforming** their organization and expanding business processes across the enterprise.

By providing unlimited document repositories and servers, Laserfiche Rio supports development, testing, staging, and production, putting you in complete control of your 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

Your [Pricing](#) section will specify what additional options have been added to your proposed solution and additional licensing information and descriptions can be found in the [Laserfiche Definitions](#) and [Laserfiche Licensing Guide](#).

# PRICING: LASERFICHE

<b>Product Description:</b>	<b>Qty.</b>	<b>Retail Unit Cost</b>	<b>NCPA 11-26</b>	<b>Total</b>
<input checked="" type="checkbox"/> Laserfiche United Server for MS SQL	-1	\$6,600.00	N/A	(\$6,600.00)
<input checked="" type="checkbox"/> Laserfiche Records Management Module	-1	\$5,700.00	N/A	(\$5,700.00)
<input checked="" type="checkbox"/> Laserfiche Full User	-49	\$595.00	N/A	(\$29,155.00)
<input checked="" type="checkbox"/> Laserfiche Retrieval User	-44	\$220.00	N/A	(\$9,680.00)
<input checked="" type="checkbox"/> Laserfiche Email Plug-in	-50	\$76.67	N/A	(\$3,833.50)
<input checked="" type="checkbox"/> Laserfiche Snapshot	-49	\$96.67	N/A	(\$4,736.83)
<input checked="" type="checkbox"/> Laserfiche Web Client	-1	\$7,591.67	N/A	(\$7,591.67)
<input checked="" type="checkbox"/> Laserfiche WebLink	-1	\$7,991.67	N/A	(\$7,991.67)
<input checked="" type="checkbox"/> Laserfiche Advanced Audit Trail	-1	\$4,991.67	N/A	(\$4,991.67)
<input checked="" type="checkbox"/> Laserfiche Quick Fields	-36	\$516.67	N/A	(\$18,600.12)
<input checked="" type="checkbox"/> Laserfiche ScanConnect (Legacy)	-9	\$163.33	N/A	(\$1,469.97)
<input checked="" type="checkbox"/> Laserfiche ScanConnect 10 Pack (Legacy)	-1	\$916.67	N/A	(\$916.67)
<input checked="" type="checkbox"/> Laserfiche Zone OCR and Validation Package <i>Includes Zone OCR and Pattern Matching.</i>	-6	\$2,698.33	N/A	(\$16,189.98)
<input checked="" type="checkbox"/> Laserfiche Real-Time Lookup and Validation Package <i>Includes Real-Time Lookup and Pattern Matching.</i>	-29	\$548.33	N/A	(\$15,901.57)
<input checked="" type="checkbox"/> Laserfiche Import Agent	-1	\$1,495.00	N/A	(\$1,495.00)
<b>Existing Laserfiche Software Credit Total</b>				<b>(\$134,853.65)</b>

## **CONTENT SERVICES SOFTWARE LICENSING FOR RIO**

<input checked="" type="checkbox"/> Laserfiche Rio Records Management Edition Named Full User (200-499 Users)	200	\$660.00	\$613.80	\$122,760.00
<input checked="" type="checkbox"/> Laserfiche Rio Forms Professional (200-499 Users)	200	\$60.00	\$55.80	\$11,160.00
<input checked="" type="checkbox"/> Laserfiche Rio Quick Fields Complete <i>Includes Quick Fields, Validation packages for Bar Code, Real-Time Lookup, Zone OCR, Document Classification, Forms Alignment, Identification, and Extractor, Optical Mark Recognition, and Auto Stamp, Redaction, &amp; Bates Numbering.</i>	1	\$15,000.00	\$13,950.00	\$13,950.00
<input checked="" type="checkbox"/> Laserfiche Rio Quick Fields Agent	1	\$10,000.00	\$9,300.00	\$9,300.00
<input checked="" type="checkbox"/> Laserfiche Rio Import Agent	1	\$1,500.00	\$1,395.00	\$1,395.00
<b>Laserfiche Software Subtotal</b>				<b>\$158,565.00</b>

## **GRAND TOTAL - ONE-TIME SOFTWARE**

**\$23,711.35**

<b>Product Description:</b>	<b>Qty.</b>	<b>Retail Unit Cost</b>	<b>NCPA 11-26</b>	<b>Annual Total</b>
<b>LASERFICHE ANNUAL SOFTWARE SUPPORT - BASIC</b>				

<input checked="" type="checkbox"/>	Laserfiche Rio Records Management Edition Named Full User (200-499 Users)	200	\$132.00	\$118.80	\$23,760.00
<input checked="" type="checkbox"/>	Laserfiche Rio Forms Professional (200-499 Users)	200	\$12.00	\$10.80	\$2,160.00
<input checked="" type="checkbox"/>	Laserfiche Rio Quick Fields Complete <i>Includes Quick Fields, Validation packages for Bar Code, Real-Time Lookup, Zone OCR, Document Classification, Forms Alignment, Identification, and Extractor, Optical Mark Recognition, and Auto Stamp, Redaction, &amp; Bates Numbering.</i>	1	\$3,000.00	\$2,700.00	\$2,700.00
<input checked="" type="checkbox"/>	Laserfiche Rio Quick Fields Agent	1	\$2,000.00	\$1,800.00	\$1,800.00
<input checked="" type="checkbox"/>	Laserfiche Rio Import Agent	1	\$300.00	\$270.00	\$270.00
<input checked="" type="checkbox"/>	Laserfiche Rio ScanConnect	20	\$100.00	\$90.00	\$1,800.00
<b>Laserfiche Annual Recurring Software Support Subtotal</b>					<b>\$32,490.00</b>

**MCCi ANNUAL SUBSCRIPTION**

<input checked="" type="checkbox"/>	Laserfiche PowerPack by MCCi Subscription <i>Requires dedicated Full Named User.</i>	1	\$1,000.00	\$950.00	\$950.00
<input checked="" type="checkbox"/>	Training Center for Laserfiche (200-499 Users)	1	\$6,995.00	\$6,995.00	\$6,995.00
<input checked="" type="checkbox"/>	MCCi SLA for Laserfiche (125-249 Users)	1	\$7,850.00	\$7,457.50	\$7,457.50
<b>MCCi Annual Recurring Subscription Subtotal</b>					<b>\$15,402.50</b>

**MCCi MANAGED SERVICES SUBSCRIPTION**

<input checked="" type="checkbox"/>	Managed Support Services for Laserfiche <i>Client needs are estimated based on the current components provided herein: up to 35 hours.</i>	1	\$4,851.00	\$4,851.00	\$4,851.00
<b>MCCi Managed Services Annual Recurring Subscription Subtotal</b>					<b>\$4,851.00</b>

<b>GRAND TOTAL - RECURRING ANNUAL SUPPORT/SUBSCRIPTION</b>	<b>\$52,743.50</b>
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*For budgetary purposes, the Client should include \$52,743.50 in annual budget for renewal of the items quoted above. Please note that if you subscribe to MCCi's Training Center or SLA, additional user licenses may increase the cost of this item at the time of your next annual renewal.*

<b>Service Description:</b>	<b>Qty.</b>	<b>Retail Unit Cost</b>	<b>NCPA 11-26</b>	<b>Total</b>
<b><u>MCCi SERVICE PACKAGES</u></b>				
<input checked="" type="checkbox"/> Enterprise System Review of Laserfiche	1	\$8,525.00	\$8,098.75	\$8,098.75
<input checked="" type="checkbox"/> Business Process Requirements Gathering for Building Department and Design & Construction Department <i>Includes 1 MCCi resource, up to 4 days onsite, travel expenses, and SOW drafting</i>	1	\$18,200.00	\$17,290.00	\$17,290.00

<input checked="" type="checkbox"/>	Implementation Services Package <i>Cost is based on the current components provided herein. Please See Implementation services section for additional assumptions and exclusions.</i> <i>-Remote in-place upgrade of existing Laserfiche modules</i> <i>-Remote installation and/or configuration of all Rio licenses and modules included in upgrade</i> <i>-Remote migration of Laserfiche user licenses to LFDS</i> <i>-Remote consultation for migration of existing Laserfiche repository, Import Agent profiles, and Quick Fields sessions</i> <i>-Project Management</i>	1	\$20,500.00	\$19,475.00	\$19,475.00
<input checked="" type="checkbox"/>	Laserfiche Filing Workflow Configuration <i>Up to 15 Document Types.</i>	1	\$4,100.00	\$3,895.00	\$3,895.00
<input checked="" type="checkbox"/>	Onsite Training, One Day <i>Workflow training and installation excluded. Includes travel expenses.</i>	1	\$3,000.00	\$2,850.00	\$2,850.00
	<b>Service Packages Subtotal</b>				<b>\$51,608.75</b>

<b>GRAND TOTAL - ONE-TIME SERVICES</b>	<b>\$51,608.75</b>
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**Initial Product Discount to Match Prices on Original Quote** *\*Discount is based on this quote and if the quote changes the discount amount is subject to change.* **(\$4,217.50)**

<b>TOTAL PROJECT COST</b>	<b>\$123,846.10</b>
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\* All pricing in this quote is from MCCi's NCPA Contract Number 11-26. Follow the link below to MCCi's contract page:

<http://ncpa.us/Vendors/MCCi>

# PRODUCT ORDER & BILLING TERMS

## PRODUCT ORDER

MCCi will process Product Orders as follows:

Product/Service Description	Timing of Product Order
All Software, Recurring Annual Support/Subscription, and Managed Services	Post Project Kick-Off.

## BILLING

MCCi will invoice Client as follows:

Product/Service Description	Timing of Billing
All Software, Recurring Annual Support/Subscription, and Managed Services	<ul style="list-style-type: none"><li>▪ <b>Initial Sale:</b> Upon delivery of software or activation of the subscription.</li><li>▪ <b>Annual Renewal:</b> 75 days in advance of expiration date.</li></ul>
Service Packages	<ul style="list-style-type: none"><li>▪ <b>For Packages over \$15,000:</b> 50% deposit upon receipt of Order, remaining 50% upon delivery completion and client acceptance.</li><li>▪ <b>All Other Packages:</b> Upon delivery completion and Client acceptance.</li></ul>

MCCi shall not send any invoices, nor claim payment, for any fees or expenses incurred by MCCi until both parties authorize this Order. Sales tax will be included where applicable and is NOT included in the Pricing section.



# SUPPLEMENTAL SUPPORT & ANNUAL SUBSCRIPTION PACKAGES

As your first-tier solution provider, MCCi provides multiple options for technical support. Your 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.

## LASERFICHE

	Managed Support Services		Process Administration Support Services	
	MSS	MSS 2	PASS	PASS 2
Easy access to our team of Certified Technicians for application break/fix support issues (i.e. error codes, bug fixes, etc.)*	■	■	■	■
Remote access support through GoToMeeting*	■	■	■	■
Access to product update version and hotfixes (Client Download)*	■	■	■	■
24/7 access to the Laserfiche Support Site and Laserfiche Answers discussion forums*	■	■	■	■
Software/support credit eligible for Laserfiche platform changes**	■	■	■	■
Additional Remote Basic Training	■	■	■	■
Additional System Settings Consultation	■	■	■	■
Assistance with Implementation of Version Updates	■	■	■	■
Annual Review of Administration Settings	■	■	■	■
Priority Offering of Laserfiche CPPs & Laserfiche Empower Registration Scholarships	■	■	■	■
Configuration and maintenance of <i>basic</i> business processes 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 Client's request			■	■
Annual Review of business process configurations				■
Institutional Knowledge of Your 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 EDT or Saturday-Sunday from 12 pm to 4 pm EDT				■
Basic JavaScript, CSS and Calculations for Laserfiche Forms*				■

\* Each Client's Support/Subscription Renewal includes these benefits, regardless of whether a supplemental package is owned.

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

## LASERFICHE SUPPORT/SUBSCRIPTION

Each Client's Laserfiche Support/Subscription Renewal covers:

- **BREAK/FIX SUPPORT**  
Our team of Certified Support Technicians will assist with break/fix issues including the resolution of error codes, bugs, etc.
- **CONTINUED EDUCATION**  
Your renewal grants you access to continued education through Webinars, User Groups, Seminars and more!
- **REMOTE ACCESS SUPPORT**  
Our Support Technicians can access your system remotely to resolve issues, saving both time and money.
- **LASERFICHE SITE ACCESS**  
You will have 24/7 access to the Laserfiche support site, which includes whitepapers, case studies, etc. You also have access Laserfiche answers, an online discussion forum. Ask questions and gain advice for other Laserfiche users, staff, and solution providers.
- **ACCESS TO VERSION UPDATES**  
Your Laserfiche renewal covers access to download the version updates for your software/subscription.
- **SOFTWARE/SUPPORT CREDIT\*\***  
When upgrading or trading in perpetual licensing, you will receive a one-time credit of the software and remaining prepaid support. When moving to Cloud/Subscription, you will receive a one-time credit of the remaining prepaid support.

## PACKAGE DESCRIPTIONS

### BUSINESS PROCESS DEFINITIONS

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, allowing a MCCi Application Support Analyst to assist with configuration, support, and maintenance of the process.
- **COMPLEX:** A large business process with extensive configuration that is absolutely 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 new complex Forms, Workflow, and Transparent Records Management configurations, please discuss a Business Process Configuration Service with your Account Executive or Account Manager.

### CLIENT RESPONSIBILITIES (ALL PACKAGES)

- Configuration/maintenance of backups and any general network, security, or operating system settings outside of your solution (Laserfiche, ABBYY, Blue Prism)
- Management and creation of 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.
- For **MSS 2, PASS & PASS 2**, create/provide process diagrams (and any other necessary paperwork/examples)

### MANAGED SUPPORT SERVICES (MSS)

MCCi's **MSS** package provides additional training and assistance to a 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 your 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 your renewal includes version updates, implementation of those updates is sometimes overlooked. With the addition of **MSS**, MCCi is at your service to directly assist with implementing software updates such as minor updates, quick fixes or point releases. Dependent on complexity and client specific configurations, major software upgrades may or may not be covered and should be discussed with your Account Management Team.

- **ANNUAL SYSTEM REVIEW & ANALYSIS**

MCCi will access your system to review how your organization uses your 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 your ABBYY solution.

## **MANAGED SUPPORT SERVICES LEVEL 2 (MSS 2)**

MCCi's **MSS 2** package 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 your annual renewal. **MSS 2** offers 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 your 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 EXISTING MIDDLEWARE/CONFIGURABLE INTEGRATIONS**

Does not include maintenance of custom-built integrations.

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

Within your 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 of the MSS 2 benefits, plus access to a dedicated representative and the ability to have recurring calls to discuss your current and upcoming projects. **PASS** pricing for the advanced block of hours is based on our 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 your annual renewal.

- **DEDICATED LASERFICHE CERTIFIED PROFESSIONAL**

While on our **MSS 2** level you will have access to our team of Certified Support Professionals, with **PASS** you will have a representative dedicated to your organization.

- **SCHEDULED RECURRING CONSULTATION CALLS**

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

### **PROCESS ADMINISTRATION SUPPORT SERVICES LEVEL 2 (PASS 2)**

**PASS 2** includes the benefits of **PASS**, but also provides the ability for MCCi to maintain complex business processes, which requires knowledge transfer and maintenance of that knowledge.

- **ANNUAL REVIEW OF BUSINESS PROCESS CONFIGURATIONS**

- **INSTITUTIONAL KNOWLEDGE OF YOUR SOLUTION**

Turnover within your organization can happen, and it's important to have a plan. Who will help your new solution administrator get up to speed on your processes and solutions in place? Leave that to us. We document your 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**

Your 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 our after-hours premium charge for server migrations and upgrades. Our Elite clients can schedule these anytime Monday through Friday from 8 am to 10 pm EDT or Saturday and Sunday from 12 pm to 4 pm EDT.

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

Excludes complex scripting.

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

MCCi will help customize your WebLink/Public Portal to meet your needs.

## **SERVICE LEVEL AGREEMENT (SLA)**

MCCi's SLAs are offered as additional options to your annual support/subscription. An SLA offers the client 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

## **THE TRAINING CENTER FOR LASERFICHE**

MCCi's Training Center for Laserfiche annual subscription provides an easy, cost-effective way for all users in your organization to access over 500 Laserfiche training videos.

### **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 your 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 your organization's internal Laserfiche training program

*\*The Training Center subscription gate is based on Laserfiche full and retrieval users.*

# SERVICE PACKAGES

## ENTERPRISE SYSTEM REVIEW OF LASERFICHE

### MCCi DELIVERABLES

- Review data structure (folder structure, metadata, etc.)
- Perform Security review and configuration
- Review current paper/electronic Forms and Workflow/Capture
- Assess current training needs
- Interview departments not using Laserfiche
- Review utilization of Laserfiche Records Management Module
- Assess Integration/Mobile Access Needs
- Present verbal report of findings while onsite
- Up to 5 hours of consulting for up to 30 days after onsite consultation

### CLIENT REQUIREMENTS

- Attendance by CIO/IT Director, Application administrators, departmental managers, and any other leadership members

## BUSINESS PROCESS REQUIREMENTS GATHERING

The MCCi Business Process Requirements Gathering includes analysis by a senior Project Manager. MCCi staff will interview stakeholders regarding a defined department and/or business process that the organization desires to be automated. The deliverable of this onsite engagement will be a Statement of Work documenting cost, hours, and desired configuration of the defined business process.

## IMPLEMENTATION SERVICES PACKAGE

MCCi's certified personnel will administer these services to assist the Client with implementing the software/subscription components purchased.

### MCCi DELIVERABLES

Professional Services may include any of the following for the purchased components:

- Assistance with basic repository configuration and user account setup (Laserfiche only)
- Remote installation and basic configuration of all software components
- Review of implemented solution

### ASSUMPTIONS

- Client will provide all necessary hardware
- Client will perform full backup of Laserfiche system before any upgrade will be conducted
- Client will install required SSL/TLS certificates
- Client will open necessary Firewall ports for software to function correctly
- Client will grant remote server access to MCCi to perform installation
- Client will configure DNS to allow the software to function correctly

### EXCLUDES

- Requirements gathering and configuration of records retention schedules
- Configuration of new Repositories, Workflows, Forms, Import Agent profiles, and Quick Fields Sessions.
- Performing the migration of data from existing environment to a new Laserfiche environment
- Upgrading Windows Client on users' machines
- Installing and configuring failover clusters or load balancing
- Installing and configuring Test Server

- Training

## **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 your organization to archive specified records in a proper format and location that is consistent with your organization's standards. To execute, MCCi's team of expert Project Managers and System Engineers will work with the Client's Project Manager to build a Business Process in the 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 any exceptions
- Respond in a timely fashion to questions posed by MCCi's Business Process Configuration team
- Appointment of Client Project Manager
- Availability of IT resources as needed and end-users for interviews and Business Process testing
- Required Laserfiche software licensing

### **MCCi DELIVERABLES**

- Configure a Laserfiche Workflow including (Up To 15 Documents) for archival
  - Includes renaming of documents and routing to appropriate folder structure
- Provide MCCi Project Manager for consultation

## TECHNICAL SUPPORT

Clients may contact MCCI support via MCCI's Online Support Center, email ([support@mccinnovations.com](mailto:support@mccinnovations.com)), or telephone 866-942-0464. Support is available Monday through Friday (excluding major holidays) from 8 am to 8 pm Eastern Time.

## PROFESSIONAL SERVICES

### CHANGE ORDER PROCESS

Any deviations from the contract will be documented in a Change Order that the Client must execute.

### CONFIGURATION ASSISTANCE

Many of our packages list remote configuration assistance for up to a certain number of days. This is based on total days, not business days.

### TRAVEL

MCCI will schedule travel in consecutive days for most engagements unless otherwise stated or agreed upon.

### SCHEDULING

All rates are based on normal business hours, Monday through Friday from 8 am to 5 pm local time. If scheduling needs to occur after business hours, additional rates may apply.

## DATA/SERVER MIGRATIONS

MCCI is not responsible for the accuracy of existing indexing data and/or image quality, such as errors on the media, image file corruption, data file corruption, orphaned records, encrypted data, non-supported proprietary formats or other errors that are not controllable by MCCI.

# LASERFICHE ASSUMPTIONS

The following assumptions are current as of the date of order. Manufacturer's terms and conditions are subject to change.

## HARDWARE REQUIREMENTS & INSTALLATION

The Client is responsible for ensuring they meet the recommended hardware requirements, which are available upon request. One of each of the following components will be installed as part of your Laserfiche solution by default unless your pricing, Statement of Work, or written correspondence with you states otherwise:

### LASERFICHE RIO

- Laserfiche Server
- Windows Client & Administration Console
- Web Access/Client\*
- Mobile
- Federated Search\*
- Import Agent (if purchased)
- Directory Server (LFDS)\*
- Workflow
- Forms\*
- Discussions\*
- Audit Trail

### LASERFICHE AVANTE

- Laserfiche Server
- Windows Client & Administration Console
- Web Access/Client\*
- Mobile
- Audit Trail (if purchased)
- Directory Server (LFDS)\*
- Workflow
- Forms\*
- Import Agent (if purchased)

### LASERFICHE SUBSCRIPTION

- Laserfiche Server
- Windows Client & Administration Console
- Web Access/Client\*
- Mobile
- Federated Search\*
- Import Agent
- Directory Server (LFDS)\*
- Records Management
- Workflow
- Forms\*
- Discussions\*
- Audit Trail

\*Requires SSL/TLS Certificate. Client is responsible for acquiring and installing prior to Laserfiche implementation.

**Note:** Configuring a test environment, setting up an external DMZ, and/or setting up failover/load balancing are not included by default and must be detailed and priced in Statement of Work to be implemented.

## LASERFICHE END USER LICENSE AGREEMENT (EULA)

As part of Client's account activation process, Laserfiche requires acceptance of the Laserfiche EULA, which can be found at <https://www.laserfiche.com/eula/home/>.

- By accepting this Order, Client acknowledges Laserfiche's EULA and agrees to abide by its terms and absolve MCCi of any Laserfiche product-related liability.

## LASERFICHE SOFTWARE ASSURANCE PLAN (LSAP)

MCCi acts as first-tier support and works with Laserfiche, who would provide second-tier level support when needed.

### ACTIVE LSAP BENEFITS INCLUDE:

- Easy access to our team of Laserfiche Gold Certified Support Technicians
- Remote desktop support through GoToMeeting
- Free Laserfiche version downloads
- Access to continued education through Webinars, User Groups, and Seminars



- Continued access to your Subscription environment (if applicable)
  - 100% upgrade credit\* for your existing software (in the event of a platform upgrade)
- \* Excludes moves to Subscription or Cloud

### **LASERFICHE LATE PAYMENT POLICY**

- If payment is not received before your Renewal Date, your Laserfiche support expires. Please allow up to five (5) business days after receipt of payment for MCCi to process renewal payment to Laserfiche.
- If your on-premises support expires, your access to the Laserfiche website and Laserfiche technicians will no longer be available until payment is received.
- If your Subscription (if applicable) support expires, your access to Laserfiche will be turned off after 30 days and your access to the Laserfiche website, and Laserfiche technicians will no longer be available until payment is received.
- If your support expiration is just due to a late payment, you will still be able to access MCCi Support Technicians for 30 days.
  - However, if there are support issues that require Laserfiche involvement, these issues cannot be resolved until your support is renewed.

### **REINSTATEMENT FEES**

- After your support has been expired for 30 days, Laserfiche will move your renewal date and will apply reinstatement fees.
  - Fees = 10% of Annual LSAP Total multiplied by the number of expired months

## **POLICIES**

- All maintenance/subscriptions are prepaid and non-refundable.
- One year of LSAP must be purchased for all new products.
- *For new systems:*
  - The support date is set 30 days after MCCi submits software order to Laserfiche.
- *For platform upgrades to Avante or Rio:*
  - The support date is set immediately upon MCCi submitting software order to Laserfiche.
  - Remaining months of LSAP can be applied toward the new purchase.
  - To receive any available software credit for existing platform software at the time of the upgrade, the Client's LSAP must be active (i.e. support/maintenance has not expired).
- *For product upgrades:*
  - To receive any available software credit for existing platform software at the time of the upgrade, the Client's LSAP must be active (i.e. support/maintenance has not expired) and the support date is prorated to match Client's existing support date.
- *For moves from on-premises platforms to Subscription:*
  - Credits are not available when moving to Laserfiche Subscription licensing options from an alternative Laserfiche licensing model.
- *For additional software:* the support date is prorated to match Client's existing support date.
- *For Subscription licensing renewals:*
  - The support will automatically renew unless Laserfiche is notified of intent to cancel at least 30 days prior to the renewal date.
  - If your Laserfiche Subscription invoice remains outstanding 30 days after the renewal date, the entire Laserfiche system will be deactivated.
  - The Subscription renewal invoice will be sent 75 days prior to the anniversary date.

## **INTEGRATIONS**

Third-party Laserfiche integrations or utilities may consume one or more Laserfiche user licenses depending on how the vendor designed and coded the integration. These additional licensing needs should be verified by the Client and considered in the user licensing purchased.

## **LASERFICHE SOLUTION PROVIDER OF RECORD**

As your current Solution Provider of Record, Laserfiche's policy dictates that MCCi is the only Solution Provider that can download software licenses and activations for you. Unless you decide to cancel your contract with MCCi or work with Laserfiche to formally change your Laserfiche Solution Provider of Record, future software purchases, upgrades, and support renewals will be processed and provided solely by MCCi.

## **LASERFICHE RIO SHARED SERVICES PROVISIONS**

The Host Entity is the owner of the Laserfiche licensing and is registered as such with MCCi and Laserfiche corporate. For Laserfiche corporate licensing rules, there can only be one licensed entity per Laserfiche Rio platform. Licensing is non-transferrable. Additionally, the Host Entity is responsible for cost allocation among the other entities that are utilizing its Laserfiche Rio Platform and for being the main point of contact for support provided through MCCi. The account can only be renewed once all entities have paid for the full LSAP.

## **CLIENT SOLUTION CUSTOMIZATIONS**

The Client may also choose to customize their system internally, without MCCi's help. MCCi is not responsible for any damages caused by the user's customization of the system. MCCi will not be held responsible for correcting any problems that may occur from these customizations. Routine updates to Laserfiche may affect any customizations made by the user. If MCCi's help is required to correct/update any customizations made by the Client, appropriate charges will apply.

## **CLIENT INFORMATION TECHNOLOGY ASSISTANCE**

For MCCi to excel in providing the highest level of service, the Client must provide timely access to technical resources. The Client must provide adequate technical support for all MCCi installation and support services. If the Client does not have "in-house" technical support, it is the Client's responsibility to make available the appropriate Information Technology resources/consultant when needed.

# **LASERFICHE DEFINITIONS**

To determine which licenses are applicable, please refer to the [Pricing](#) section. Your specific implementation may not include all features below.

## **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 ACCESS**

A web-based thin client, offering virtually all document management capabilities of the standard Laserfiche interface. Web Access allows your IT staff to roll out high-volume Laserfiche access and version updates without increasing your organization's application support burden. Web Access 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 an on-premises installation of SharePoint.

## **LASERFICHE MOBILE/WEB ACCESS LIGHT**

Let's organizations 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 Access 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 your organization’s needs. You can:

- Create custom forms from a library of field or selection elements.
- Utilize the Business process library includes (10.1+) 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).
- 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
<b>Business process and form creation functionality*</b>	■	■
<b>Operational Dashboard</b>	■	■
<b>View basic reports on process instances, tasks, and process data</b>	■	■
<b>Teams</b>	■	■
<b>Direct Approval through Email</b>	■	■
<b>Database Lookups</b>		■
<b>Performance Dashboard</b>		■
<b>Enhanced reporting with built-in data aggregation options such as count, sum, min, max, average, and median</b>		■
<b>Create advanced reports with data visualizations including charts and graphs</b>		■
<b>Payment Gateway (Compatible Payment Processor Account Required)</b>		■

\* 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.

### 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. Only available if currently owned.

### LASERFICHE FORMS AUTHENTICATED PARTICIPANTS

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 and participate in forms approval processes. Note: In the Avante platform, a Forms Authenticated Participant license is required for each Forms Server that the user needs to submit to, whereas with the RIO platform Laserfiche Directory Services authentication can be configured/utilized to avoid the need for additional licensing per user. Only available if currently owned.

### 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 EDU and/or the State Board of EDU.
  - A preschool meeting all of the following:
    - is an early childhood program that serves a minimum of ten children ages two through five.
    - has been in operation for at least one year 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 EDU 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 EDU and/or the U.S. Department of Education.

### **SUBSCRIPTION LASERFICHE PROCESS USERS**

For employees in need of user authentication and read-only repository access. Deployment is handled by Laserfiche Directory Server (LFDS). Process Managers have all Laserfiche Forms functionality:

- Create forms and participate in forms processes
- Create, manage, edit, and administer workflow processes
- Create, edit, assign teams, members and, roles
- Create and view reports

### **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 .NET, 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, determine 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.Net Scripts.

## **LASERFICHE PLUS™**

Allows information stored in Laserfiche to be portable. When published by Laserfiche Plus files can be viewed by anybody, regardless of whether they have Laserfiche installed. This software prepares a copy of the Laserfiche files (images, text, electronic files, annotations, templates, and field data) for burning directly to your removable media or to a temporary directory. Choosing to publish to a temporary directory allows you to write it to your removable media at your convenience.

## **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 POWERPACK BY MCCi**

A suite of tools that have been developed to help clients do more with their Laserfiche system including an analytics dashboard with reporting, custom workflow activities, mass OCR capabilities, and more. MCCi will continue to add useful tools to the PowerPack regularly based on client suggestions and our own Laserfiche experts' input. Requires a dedicated Laserfiche user license.

## **ANALYTICS DASHBOARD & REPORTING**

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

- Dashboard & drilldown reports
- Documents 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.

- 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**

We have 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 you advanced capabilities that Laserfiche does not currently provide.

- **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 INTEGRATIONS DEFINITIONS

To determine which licenses are applicable, please refer to the [Pricing](#) section. Your specific implementation may not include all features below.

## 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 you to:

- Search results 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 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.

## RATCHETX INTEGRATION

A configurable and robust middleware integration tool for Laserfiche. With a single click of a button, new documents can be added to Laserfiche from another application, and users can search Laserfiche directly from the applications they use most. The robust toolset it provides for accessing data from other applications (even the toughest proprietary systems), for use configuring the most common ECM integrations: Indexing, importing/scanning, and executing search queries. In addition, RatchetX provides the capability to create custom integration activities, such as populating a record in another system from the data extracted during the intake process in Laserfiche or looking up a record in another system from the Laserfiche interface itself (Bi-directional Integration).

## 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 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 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 the client upgrade 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 On-Premises 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 (10.1 or higher) 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.

### **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" your NEOGOV documents from your cloud-based NEOGOV implementation to your 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 your Laserfiche environment. This endpoint must be able to reach your Laserfiche server to store the record, while also being accessible over the public internet for the NEOGOV service to send the records to your 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 your Laserfiche environment to install our 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 your DMZ environment.
- This listener service must be able to transfer received documents to your 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.

# LASERFICHE LICENSING GUIDE

To determine which platform/licenses are applicable, please refer to the [Pricing](#) section.

LASERFICHE PLATFORM ARCHITECTURE				
	Avante	Rio	Subscription	Cloud
Application Servers	1	Unlimited	Unlimited	1 (Hosted)
Repositories	1-15 (1 included)	Unlimited	Unlimited	1
Database Options	SQL Express, SQL	SQL	SQL	Amazon Web Services
Web Admin Console	Included	Included (Directory Server)	Included (Directory Server)	Included
FULL USE ACCESS LICENSES				
	Avante	Rio	Subscription	Cloud
Full Named Users	Minimum of 1	Minimum of 25	Minimum of 10	Minimum of 1
Workflow	Included	Included	Included	With Process Automation
Snapshot	Included	Included	Included	Included
Email	Included	Included	Included	Included
Web Client	Included	Included	Included	Included
Mobile Access	Included	Included	Included	Included
Digital Signatures	Add-on Option	Included	Included	Included
Audit Trail	Add-on Option (Starter, Standard, Advanced)	Included (Advanced)	Included (Advanced)	Included (Advanced)
ScanConnect	Add-on Option	Add-on Option	Add-on Option	Add-on Option
Connector	Add-on Option	Add-on Option	Included	Included
Forms Essentials	Included with v10.2.1+	Included with v10.2.1+	Included with v10.2.1+	With Process Automation
Forms Professional	Add-on Option	Add-on Option	Included	With Process Automation
LIMITED USE ACCESS LICENSES				
	Avante	Rio	Subscription	Cloud
Retrieval Named Users	Not Available	Minimum of 200 only if currently owned	Not Available	Not Available
Forms Authenticated Participants	Add-on Option only if currently owned	Add-on Option only if currently owned	Not Available	Not Available
Participant Users	Add-on Option	Add-on Option	Not Available	Not Available
Participant Users (Subscription)	Add-on Option w/LFDS	Add-on Option	Add-on Option	Add-on Option
Community Users (Subscription)	Add-on Option w/LFDS	Add-on Option	Add-on Option	Add-on Option
Education Users (Subscription)	Add-on Option w/LFDS	Add-on Option	Add-on Option	Not Available
Process Users (Subscription)	Add-on Option w/LFDS	Add-on Option	Add-on Option	Not Available
Enterprise Identity Management	Not Available	Add-on Option*	Add-on Option*	Not Available
MODULE BASED LICENSES				
	Avante	Rio	Subscription	Cloud
Import Agent	Add-on Option	Add-on Option	Included	Included
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))	Options: 25, 50, 100, Unlimited (Per Laserfiche Application Server)	100 Views/Month Included Options: 1,000, 10,000, 100,000 Views/Month
Records Management	Add-on Option	Add-on Option	Included	Included
Quick Fields ††	Add-on Option	Add-on Option	Included	Add-on Option
Forms Portal	Add-on Option	Add-on Option	Add-on Option	Options: 1,000, 10,000, 100,000 Submissions/Month
Enterprise Forms Portal #	Add-on Option	Add-on Option	Not Available	Not Available

† 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).

## **MCCI MASTER SERVICES AGREEMENT**

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MCCI's Master Services Agreement is available upon request for review. Please contact your Account Manager or Account Executive for more information.