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**Re: Request for Non-Bid Proposals for Records Management Service Provider**

CDI is pleased to present the following customized solution for Park City in response to the City's Request for Non-Bid Proposals for Records Management Service Provider. The proposed solution is based upon the careful study of the RFP release documentation, as well as additional clarifications made in the Questions and Answers documentation and the Park City Municipal Corporation Professional Services Agreement – Cyber agreement.

**It is the understanding and opinion of CDI that Park City is utilizing this RFP in order to identify potential vendors to partner with in designing, implementing, and configuring a new, integrated ECM for efficiency, automation and best practices. CDI is planning to offer:**

1. Where requested, interviews, design, guidance and implementation of business process automation functions and processes in a Laserfiche RMS system.
2. Guidance in implementing the Utah State records policy for Records Management.
3. Configure a public records portal and e-forms portal for citizen engagement.
4. Integration into some or all of the line-of-business applications:
  - a. ArcGIS – Out-of-the-box mapping and geospatial document access
  - b. CityWorks – Custom integration created to client specifications
  - c. DocuSign – Out-of-the-box automation of contract creation, review and signing
  - d. Tyler Eden Integration – Out-of-the-box see invoices in RMS from Tyler Eden
5. Training, project management and leadership for the project.
6. Ongoing technical support and proactive relationship to grow usage and foster success.

The solution and services being proposed includes software manufactured by Laserfiche, a solution that's been refined for more than 30 years with over 35,000 organizations using the product. The Laserfiche solution offers excellent scalability to many thousands of users, state-of-the-art feature sets for Workflow and Web Forms and a powerful API. This software solution will be implemented by an experienced team of trainers, PMP and BA accredited staff members. The extended resources at CDI will also help tremendously in future/optional phases with system leadership, development and API assistance and conversion of existing data.

CDI is especially qualified to undertake and execute the implementation of Park City Document Management system because of experience, resources and dedication to cultivating true partnerships with clients.

**It is the opinion of CDI that the City will find CDI an exceptional candidate for the proposed project for the following reasons:**

1. **Experience:** CDI has 18+ years of experience working with large and small state agencies and currently supports 600 RMS/EDMS/ECM clients nationally. CDI is a Gold/Platinum-certified Laserfiche provider.
2. **Leadership:** CDI has led clients through records management and conversions ranging in size from the Medicaid/Medicare Processing Centers to the Utah Retirement System and Public Employee Health Program. Many of the CDI employees have more than 10 years of experience and worked through large, challenging enterprise projects.
3. **Integration:** The development team at CDI has integrated into hundreds of applications and is Laserfiche's largest development partner. With this track record and experience in integration, CDI will be helping your team launch the project and guiding or building the interfaces, leading to a successful completion.
4. **Carbon reduction:** CDI has a strategy of pursuing carbon reduction in our business as well. We have completed a carbon count have implemented reductions and offsets to become carbon neutral by the end of 2020.
5. **Security:** CDI has passed an SSAE16 audit within the past 12 months and uses a datacenter that is SOCII audited.



It is our belief that CDI has the best offering for The City's project to implement a new Record Management solution with paperless document management, streamlined contracts processing and integrations. Our experience, staff, integrations and guidance will ensure a successful migration to business process automation.

For the purposes of this RFP Response, Patrick Welsch is the main point of contact.

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Sincerely,



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## Table of Contents

SOFTWARE FEATURES.....	1
REQUIRED HARDWARE .....	8
COST.....	10
IMPLEMENTATION AND TRAINING SCHEDULE.....	12
CDI Project Team.....	13
Implementation Project Plan and timeline.....	14
Ongoing Support .....	16
REFERENCES.....	18
APPENDIX A: SOFTWARE SUPPORT POLICY .....	19
APPENDIX B: BONUS! CONTRACTS PROCESS JUMP START.....	20
APPENDIX C: Training CATALOG .....	22

## SOFTWARE FEATURES

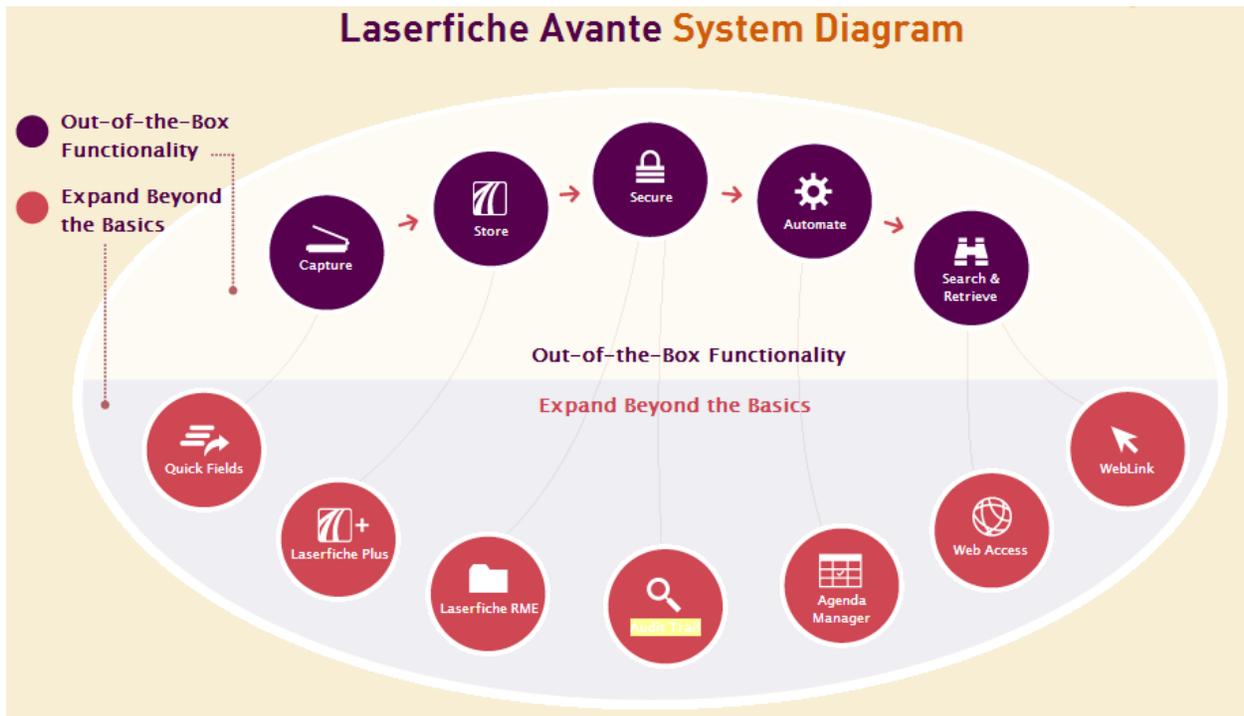
CDI is a company dedicated exclusively to document imaging and management solutions. We concentrate our expertise into innovative paperless solutions utilizing the award winning and industry leading Laserfiche solution. By choosing CDI as your Records Management technology vendor, you can source all of your document management software, services and conversions from the same company. Our team will provide software, implementation, support, training, integrations, document scanning, legacy system conversions, and software maintenance going forward.

In supporting and implementing more than 500 Laserfiche solutions, CDI has acquired knowledge that is specific to the use of Laserfiche in schools, law enforcement, public administration, financial services and investment, as well as healthcare. Additionally, the experience gained while working with a myriad of clients has provided valuable insight into office interaction, workflow and communication processes that ripple through a Records Management implementation such as Laserfiche.

After careful review of the RFP documentation, CDI has assembled the following software components into the proposed software solution for the City. You will find that the software components in this solution include the functionality needed for:

Project Scope	Proposed Software
Ability to scan documents directly into software and auto-import from MFDs	List of supported scanners is available here: <a href="https://www.laserfiche.com/products/supported-scanners/">https://www.laserfiche.com/products/supported-scanners/</a>
OCRing documents	Laserfiche Server and Client
Setting Departmental security rights for multiple users	Laserfiche Server and Client
Setting up retention schedules and alert users before destruction	Laserfiche Server and Client
Restricting access, manipulation and destruction of documents	Laserfiche Records Management Server
Importing meta data from third party program, excel, or csv file	Laserfiche Workflow
Robust search capability	Laserfiche Server and Client
Importing documents directly from other software platforms	Laserfiche Client
Image adjustment of documents, cropping, redaction, etc.	Laserfiche Scanning and Client
Creating a Public access portal	Laserfiche Public Portal
Creating and streamlining the contract workflow with electronic signature capability	Laserfiche Forms, Laserfiche Workflow, and DocuSign Integration
Integrating GIS platforms (ArcGIS and Cityworks) with geo-reference capability and map display. INCLUDING a single URL to files, regardless of the storage location.	ArcGIS Integration and Laserfiche WebLink

*Laserfiche Avante Records Management Edition Server*



The Laserfiche Avante Server centralizes management of multiple types of information, including digitized paper documents, electronic documents, e-mail and digital audio and video files.

In addition to industry-leading document management to help you store and retrieve your information, Avante includes sophisticated workflow tools to automate business processes. Whether you have a staff of one or one hundred, you'll simplify complex tasks, promote better decision making and keep your organization moving forward.

**With Records Management Edition, you:**

- Enforce enterprise-wide records policies—regardless of your records’ format, location or content.
- Automate life cycle management from document creation to final disposition.
- Run reports detailing where records are in their life cycle and which records are eligible for transfer, accession or destruction.
- Log all system activity, providing an audit trail that can be used to prove adherence to your records management plan—and compliance regulations.
- Ensure the future accessibility of your archived records with storage in non-proprietary TIFF file format.
- Safeguard records with comprehensive access controls.
- Support compliance with Sarbanes-Oxley, HIPAA, USA PATRIOT Act, SEC, FINRA and other regulations.
- Reduce litigation risks associated with expired and outdated records.

**Licensing Model:**

The Laserfiche Avante Records Management Edition Server is a per server license. Each Laserfiche Avante Records Management Edition Server that will be required for the client’s site will need access to a Microsoft SQL or Oracle database license (not included).

### *Laserfiche Full Named User*

The desktop-based Laserfiche Client offers users intuitive, instant access to information. Each user has their own connection through the Laserfiche Client, so they are always able to access their information.

The Full Named User License includes the ability to:

- Laserfiche Scanning is an intuitive scanning interface to add paper documents into your Laserfiche repository. An array of tools enables you to enhance images, so you get the most accurate text capture possible.
- Laserfiche Web Access and Mobile allows user to access the repository through a web browser or mobile apps through Android, Apple and Windows mobile devices.
- Laserfiche Snapshot™ creates archival TIFF images of electronic documents, without repetitive printing and scanning.
- Laserfiche E-mail Plug In™ uses any MAPI-compliant e-mail application to distribute documents stored in the Laserfiche repository.
- Participate in Laserfiche Workflows to route, approve and auto-file documents.

#### **Licensing Model:**

The Full Named User is a named user license. This license includes access through the installed program or Web Access thing client, in version 10 and later. Each user who will need read-write access to the Laserfiche repository will need a Full Named User license. Number of licenses purchased should directly reflect number of employees needing any type of edit capabilities in the Laserfiche repository.

### *Laserfiche Forms Professional*

With Forms Professional:

- Easily create attractive forms using preconfigured templates that allow you to specify colors, fonts, logos and more.
- Drag and drop a wide variety of fields, checkboxes and radio buttons onto your form to collect the exact information you need—in the precise format you require.
- Configure form elements so that they are hidden or displayed based on selections made in other fields, improving the user experience and ensuring that you don't collect unnecessary data.
- Change the look and feel of your form—or add or delete questions from it—at any time without help from programmers.
- Pulls user data from your primary applications to pre-populate forms for known audiences, reducing the need for staff to rekey or manually validate information like name, address and phone number.
- Prevents common user errors such as incomplete fields and incorrect data types, improving both the user experience and the quality of your data.
- Uses role-based security to ensure that access to submitted data is limited to authorized personnel, guaranteeing the security of confidential information.

#### **Licensing Model:**

Forms Professional is a percentage add-on per user.

### *Laserfiche Import Agent*

Laserfiche Import Agent provides effortless document importing and management within a Laserfiche repository. These documents come from a variety of sources, such as multifunctional peripherals (MFPs), which include devices performing any combination of printing, faxing, scanning, and copying. Without the Import Agent, the risk of misfiling documents and incorrect index cards exists. Documents are more difficult to find as a result. Laserfiche Import Agent maximizes document accessibility by automating document importing and document management within the Laserfiche repository.

Laserfiche Import Agent looks for documents wherever they are created and sends those documents to a Laserfiche folder. The Laserfiche Import Agent monitors single or multiple locations. For example, an MFP captures documents and stores these documents in a directory. Laserfiche Import Agent automatically looks for specified documents in that directory and moves them to the Laserfiche repository.

Configurable document filters in Laserfiche Import Agent organize documents into folders based on filename, document type, or a combination. For example, the Import Agent provides the capability of importing TIFF images from a network folder into the Laserfiche repository. Moreover, the Import Agent auto-populates the index card template fields for the imported TIFF image.

An automated schedule efficiently archives documents in the Laserfiche repository. Schedules represent the time during which the Laserfiche Import Agent actively looks for documents in specific directories thereby minimizing network traffic during peak hours of the day.

#### **Licensing Model:**

Import Agent is a single server license. The application may be installed on a server and will allow unlimited profiles to be configured to shuttle documents from a network location to a Laserfiche location.

### *Laserfiche Public Portal*

Laserfiche Public Portal allows you to generate a content portal site based on a database, without coding or programming. Anyone with a connection to the Internet or a local intranet has access to the information they need—often reducing the burden on staff of responding to requests for information.

Public Portal functionality enables your organization to make information available to more interested parties than typically have access to your content repository. Specifically, adding Public Portal to the full Laserfiche Client allows you to offer two views into the same active repository: full read/write access to individuals who need to work with content (e.g., internal use with the Client), and read-only access with no modify or delete capabilities for the public (e.g., external publication with Public Portal). In addition, WebLink sites can now be crawled by Internet search engines, so your public documents can be found the same way users find other pages on the Internet.

With Laserfiche Public Portal, access, security, and customization are easy. Your published Public Portal site is browser and platform independent, so anyone who needs to access your content can find it. Administrators put the power of Laserfiche access controls to work to allow or restrict public access to appropriate information. And functionality can be customized to your organization's needs, just as the look and feel can be customized to match your branding.

#### **Licensing Model:**

Public Portal is a per server, per processor license. The organization will need a Public Portal license for each server that they wish to have Public Portal installed on.



### *Laserfiche Forms Portal*

Forms Portal expands the functionality in Laserfiche Forms to include publicly available forms that users can fill out anonymously. In contrast, users must log in to Laserfiche Forms without the Portal Add-on.

#### **Licensing Model:**

- The **Laserfiche Forms Standard Portal Add-on** is licensed per instance. You can allocate each Forms Portal instance you have to one Forms Server. To use Forms Portal with a particular Forms Server, you'll register the server as normal during installation and allocate the Forms Portal to the desired Forms Server from the Rio License Manager.
- With the **Laserfiche Forms Enterprise Portal Add-on**, every instance of Laserfiche Forms will have the additional Forms Portal functionality.

### *CDI ArcGIS Integration*

With the ArcGIS Integration from CDI you can:

- Easily interact between the ArcGIS interface and a Laserfiche repository.
- Users can upload documents to Laserfiche straight from the ArcGIS interface and view any related documents already stored in Laserfiche.
- They dynamic ArcGIS map will auto-populate, indicating which feature on the map have associated documents in Laserfiche.
- Laserfiche files are viewable for display by generating a URL through either Web Access or Weblink.
- Files are uploaded and imported into Laserfiche automatically applying template data based on widget settings.
- Feature layer documents can be stored in a separate database so that the map data loads quickly.
- A user can select the feature layers and fields to map to Laserfiche so that they can determine which metadata will be populated on the document.
- ArcGIS is used by firms to improve planning and analysis, operational awareness, field data collection, asset management and community engagements.

#### **Licensing Model:**

This integration is purchased as a single site license for the purpose of accessing Laserfiche documents while within ArcGIS, version 10.0 or higher. The purchase of this license allows the client to use the integration application, but does not include the source code.

#### **Laserfiche License Notes:**

Each user accessing Laserfiche documents through this integration will require a named Laserfiche user or a concurrent Laserfiche user license. Integrating this product will require Laserfiche 9.1 or higher and Web Access or Weblink.

### *CDI DocuSign Integration*

**CDI's** DocuSign integration for Laserfiche allows users to easily send documents stored in a Laserfiche repository out for signature through the DocuSign editor. Users are able to 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.

The DocuSign Integration from CDI allows Laserfiche users to:

- Easily open documents in the DocuSign editor right from Laserfiche.
- Apply recipient specific tags to documents – tags which indicate where users should insert such things as signatures, initials, date/time, company name, approval checkboxes etc.
- Send documents for signature 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.

#### **Licensing Model:**

The DocuSign Integration is a per user license. DocuSign signatures are collected through DocuSign Envelopes and envelopes are sold as a separate product. DocuSign Envelopes can be purchased through CDI or a client may use an existing DocuSign account and envelopes with the DocuSign Integration.

### *Tyler Eden / Munis License*

**Tyler Eden's** integration with Laserfiche is created and maintained by Tyler Eden and licensed through CDI. This integration allows for images scanned into Laserfiche to be displayed within the Tyler Eden interface.

The Tyler Eden / Munis Integration from Tyler Eden allows users to:

- Easily view related documents in the DocuSign editor right from Laserfiche.
- Link files scanned into Laserfiche to their related file in Tyler Eden

#### **Licensing Model:**

The Tyler Eden / Munis Integration is a single site, concurrent license. The license allows all Tyler Eden users to access the image files.

## REQUIRED HARDWARE

Laserfiche operates on very common platforms that already exist in most professional environments including Windows OS, SQL server, and a wide variety of hardware configurations. Laserfiche provides a compressive pre-installation checklist that contains all pre-requisites for software and hardware that can be found here: [https://www.laserfiche.com/support/webhelp/Laserfiche/10/en-US/administration/#../Subsystems/LFAdmin/Content/Installation/Laserfiche\\_Server\\_\(United\)\\_pre\\_check.htm](https://www.laserfiche.com/support/webhelp/Laserfiche/10/en-US/administration/#../Subsystems/LFAdmin/Content/Installation/Laserfiche_Server_(United)_pre_check.htm)

### Minimum Hardware Specifications

<b>CPU:</b>	Pentium 4, Opteron, or Athlon 64, or more recent processor (at least 1.8 GHz); a 64-bit CPU is required and the operating system must be an x64 version
<b>Memory:</b>	2 GB RAM

### Minimum Hardware Specifications

<b>Operating system:</b>	<p>Windows Vista (Service Pack 2)          Windows Server 2008 (Service Pack 2)          Windows 7 (Service Pack 1)          Windows Server 2008 R2 (Service Pack 1)          Windows 8          Windows 8.1          Windows Server 2012          Windows Server 2012 R2          Windows 10          Windows Server 2016</p> <p><b>Note:</b> The Laserfiche Server is only supported on x64 versions of your Windows operating system.</p> <p><b>Important:</b> Laserfiche 10 components cannot be installed on Windows XP or Windows Server 2003. Attempting to install on these operating systems will generate an error.</p>
<b>Database engine:</b>	<p>SQL Server 2008 (Service Pack 3)          SQL Server 2008 R2 (Service Pack 2)          SQL Server 2012 (Service Pack 2)          SQL Server 2014          SQL Server 2016          SQL Server 2017          Oracle 10g (10.2.0.5+)          Oracle 11g (11.1.0.7+)          Oracle 11g R2 (11.2.0.1+)</p>

<p><b>Operating system:</b></p>	<p>Windows Vista (Service Pack 2)          Windows Server 2008 (Service Pack 2)          Windows 7 (Service Pack 1)          Windows Server 2008 R2 (Service Pack 1)          Windows 8          Windows 8.1          Windows Server 2012          Windows Server 2012 R2          Windows 10          Windows Server 2016</p> <p><b>Note:</b> The Laserfiche Server is only supported on x64 versions of your Windows operating system.</p> <p><b>Important:</b> Laserfiche 10 components cannot be installed on Windows XP or Windows Server 2003. Attempting to install on these operating systems will generate an error.</p>
	<p>Oracle 12c</p> <p><b>Note:</b> Note: The Oracle server must be used with a supported Oracle client, and the Oracle client and the corresponding version of Oracle Data Access Components must be installed on the computer hosting the Laserfiche Server. Laserfiche supports Oracle client 11.2.0.3 and later, and Oracle client 12.1.0.2 and later.</p> <p><b>Note:</b> Express editions of the above Microsoft SQL Server versions are supported, but are only suitable for repositories of fewer than one million pages and five or fewer simultaneously-connected users. Larger or more frequently-accessed repositories will see significant performance issues when using Microsoft SQL Server Express.</p>

**Additional Requirements**

<p><b>Licensing:</b></p>	<p>Laserfiche Server 10.x license file or activation key, or registration via Laserfiche Directory Server.</p>
<p><b>Privileges:</b></p>	<p>Administrative privileges on the source computer.</p>
<p><b>Firewall:</b></p>	<p>Additional configuration may be required when the Laserfiche Server must communicate across a firewall.</p>
<p><b>Web Server:</b></p>	<p>IIS 7 or higher (required for Audit Trail Web Reporter only).</p>
<p><b>Web Browser:</b></p>	<p>Internet Explorer 7 or later, Microsoft Edge, Firefox, Chrome, or Safari</p>



**Patrick Welsch**  
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**Prepared for: City of Park City**  
 Quote #: 885895v.1  
 Quote Date: 2/5/2020

Annual Breakdown

	Year 1	Year 2	Year 3	Year 4
<b>Total Software</b>	\$134,079.50	-	-	-
<b>Total Maintenance</b>	\$28,500.00	\$28,500.00	\$28,500.00	\$28,500.00
<b>Total Services</b>	\$23,781.20	\$6,200.00	\$6,200.00	\$6,200.00
<b>*TOTAL</b>	\$186,360.70	\$34,700.00	\$34,700.00	\$34,700.00
<i>*Tax not included</i>				

Software & Annual Maintenance

Product	Software Quantity	Soft. Unit Cost	Maint. Unit Cost	Total
Laserfiche Rio Named Full Users 100-199 users (ENF01)	100.00	\$700.00	\$140.00	\$84,000.00
Laserfiche Forms Professional (Named Full Users 100-199 users) (EFRM3)	100.00	\$70.00	\$14.00	\$8,400.00
Laserfiche Records Management Edition (Named Full Users 100-199 users) (ERM3)	100.00	\$70.00	\$14.00	\$8,400.00
Laserfiche Import Agent (IA)	1.00	\$1,500.00	\$300.00	\$1,800.00
Laserfiche Public Portal Unlimited Read-Only license (PPX)	1.00	\$45,000.00	\$9,000.00	\$54,000.00
ArcGIS Integration with Laserfiche (CD2155)	1.00	\$5,000.00	\$1,000.00	\$6,000.00
DocuSign Integration and Workflow Activities (CD7022)	1.00	\$2,000.00	\$400.00	\$2,400.00
CityWorks Integration	1.00	\$5,000.00	\$1,000.00	\$6,000.00
Software: \$142,500.00 Maintenance: \$28,500.00 Utah Preferred Rate (\$8,420.50) Tax: \$ .00 <b>Total: \$162,579.50</b>				

Services

Service	Service Quantity	Service Unit Cost	Total
Consulting Service Hours – Implementation per Project Plan	132.00	\$124.00	\$16,368.00
Tyler Eden / Munis Integratoin Licensing	1.00	\$3,000.00	\$3,000.00
Onsite Travel – Two planning weeks, Planning & Go Live/Training	2.00	\$1,750.00	\$3,500.00
DocuSign Envelope Licensing Annual Subscription 500 Envelopes	1.00	\$3,200.00	\$3,200.00
Service: \$26,068.00 Utah Preferred Rate (\$2,286.80) Tax: \$ .00 <b>Total: \$23,799.20</b>			



LASERFICHE PARTICIPANT SUBSCRIPTION USERS – ALLOWS UPLOADING VIA FORMS, WORKFLOW APPROVAL AND READ-ONLY ACCESS TO LASERFICHE

Subscription Pricing

Product	Software Quantity	Soft. Unit Cost	Subscription Unit Cost	Total
Participant Users 200-499 (JPARB)	300.00	\$ .00	\$48.00	\$14,400.00
			Software:	\$ .00
			Annual Subscription:	\$14,400.00
			Utah Preferred Rate:	(\$720.00)
			Tax:	\$ .00
			<b>Total:</b>	<b>\$13,680.00</b>

## IMPLEMENTATION AND TRAINING SCHEDULE

It is anticipated the software will be implemented and useable by March 31, 2020.

CDI Solutions Consultants will work with Park City's project manager to provide tools and assistance that will help during the implementation period. In addition to scheduled progress reports, real-time updates can be provided to Park City's staff upon request. As previously noted, CDI will be the sole point of contact and provider for all aspects of Park City's Laserfiche implementation. The following represents the general steps taken to implement and deploy the Laserfiche solution.

### 1. Planning and Consulting Meeting

The initial meeting after Park City's Contract Award will be for planning and consulting. This meeting can take place on the start date of the contract, or shortly thereafter. The planning and consulting will require time from the key decision maker and staff time to determine how the software will be used, identify key resources and contacts, and set timelines. Planning and consulting will revolve around the recommended processes and procedures, and initial planning of priorities for implementation and documentation. Deliverables for this meeting will include an overall implementation strategy, implementation plan, and detailed project timeline.

### 2. Software and Hardware Order

Upon receiving a PO for the software and hardware, CDI will order the products. This process takes five business days to complete and will begin immediately after the PO is received.

### 3. Assemble Project Management Team

With all implementations, CDI carefully assembles a project management team. Considerations are made for the assemblage of personnel that comprise the team, so that the highest degree of expertise, relative to the project, is readily available.

### 4. Initial Documentation

CDI staff will meet with Park City's key departmental contacts that will administer and support the Laserfiche software. Our staff will consult with Park City's staff to develop policies and procedures that will best meet the business needs and adhere to best practices for document management. CDI will then develop initial training materials that will illustrate the procedures and state the policies for end users. This documentation will be available in editable format to Park City staff.

### 5. Software Installation/Pilot User Training and Testing

The software will be installed on target test computers at Park City. Any scanners that have been purchased for the initial phase will also be installed and tested. Initial setup of the server and client computers will be completed on this day. Generally, the next day will include onsite user and administrator training. Training may include configuration of some system components if configuration was not completed by CDI installation personnel. When configuration is complete, pilot users will test policies and procedures. During testing, CDI staff will be available for consultation and guidance on the setup and making adjustments to settings. Following testing, customized documentation will be adjusted.

## 6. Configuration All Other Training

When testing has been completed, and policies and procedures are in place, all other users may be trained on how to use the system. Training will include full users and retrieval only users. This training will be completed onsite and should be conducted in small groups.

## CDI PROJECT TEAM

### CDI Project Manager

The Project Manager's role will include:

- Centralizing communication for CDI staff about the project
- Providing progress reports for CDI projects
- Ensuring that deadlines are met, and that tasks and information requests are fulfilled
- Scheduling progress meetings

### CDI Business Process Consultant (BPC)

The BPC's role will include:

- Gathering specifications and requirements for configurations
- Initial configuration of software solutions
- Assistance with client-led configurations

### CDI Trainer

The trainer will be responsible for:

- Customizing documentation for policies and procedures
- Providing information to Park City Project Manager regarding recommended training sessions
- Conducting training sessions

### CDI Technical Support

Technical Support's role will include:

- Providing professional installation services
- Providing technical infrastructure recommendations as requested by the Project Manager
- Resolving technical support requests during all phases of implementation
- Resolving ongoing technical support requests from users of all levels at Park City

### CDI Integration Programmer

The integration programmer will be responsible for:

- Evaluating integration options for software
- Configuring integrations if out-of-the-box
- Programming custom integration features
- Troubleshooting integration issues

## IMPLEMENTATION PROJECT PLAN AND TIMELINE

The following project plan is a proposed timeline and task list based on projects that are similar to the one the City has described in their RFP for a Records Management Service Provider.

Task Name	Hours Est.	Duration	Start	Finish	Resource Names
<b>Implement Laserfiche Solution</b>	<b>132</b>	<b>67 days</b>	<b>1/30/20</b>	<b>5/1/20</b>	
Contract Agreement Signed	0	1 day	1/30/20	1/30/20	Client PM
<b>Stage I - Project Management &amp; Needs Analysis</b>	<b>26</b>	<b>67 days</b>	<b>1/30/20</b>	<b>5/1/20</b>	
<b>Project Management</b>	<b>26</b>	<b>67 days</b>	<b>1/30/20</b>	<b>5/1/20</b>	
Conduct Project Kickoff Meeting	2	1 day	1/30/20	1/30/20	CDI PM,Client PM,Client Stakeholders,Client IT
Draft Project Plan	4	3 days	1/31/20	2/4/20	CDI PM
Approve Project Plan	0	3 days	2/5/20	2/7/20	Client PM
Conduct Ongoing PM Tasks	20	60 days	2/10/20	5/1/20	CDI PM
<b>Stage II - Installation</b>	<b>0</b>	<b>9 days</b>	<b>2/10/20</b>	<b>2/20/20</b>	
<b>Install Laserfiche</b>	<b>0</b>	<b>8 days</b>	<b>2/10/20</b>	<b>2/19/20</b>	<b>CDI Installer,Client IT</b>
<b>Plan Installation</b>	<b>0</b>	<b>7 days</b>	<b>2/10/20</b>	<b>2/18/20</b>	<b>CDI Installer,Client IT</b>
Conduct Support Installation Meeting	0	1 day	2/10/20	2/10/20	CDI Installer,Client IT
Prepare System Architecture	0	5 days	2/11/20	2/17/20	Client IT
Download Software	0	1 day	2/18/20	2/18/20	Client IT
<b>Conduct Installations</b>	<b>0</b>	<b>2 days</b>	<b>2/19/20</b>	<b>2/20/20</b>	<b>CDI Installer,Client IT</b>
Install & Test Server Components	0	1 day	2/19/20	2/19/20	CDI Installer,Client IT
Install & Test Workstations	0	1 day	2/20/20	2/20/20	Client IT
<b>Stage III - Training &amp; Evaluation</b>	<b>7</b>	<b>0.5 days</b>	<b>2/21/20</b>	<b>2/21/20</b>	
<b>Project Team Training</b>	<b>4</b>	<b>0.25 days</b>	<b>2/21/20</b>	<b>2/21/20</b>	
<b>Stage IV - System Configuration</b>	<b>89</b>	<b>33 days</b>	<b>2/21/20</b>	<b>4/8/20</b>	
<b>Records Management Setup, includes templates, folders, security for 9 departments: Executive, Building, Finance, Planning, IT, Public Works, Engineering, Legal, and HR</b>	<b>45</b>	<b>8.25 days</b>	<b>2/21/20</b>	<b>3/4/20</b>	
Design	5	0.25 days	2/21/20	2/21/20	CDI BPC,Client PM,Client Implementation Team
Development	20	5 days	2/21/20	2/28/20	CDI BPC
Testing	10	2 days	2/28/20	3/3/20	CDI BPC,Client PM,Client Stakeholders
Deployment includes End User Training	10	1 day	3/3/20	3/4/20	CDI BPC,Client PM,Client Stakeholders
<b>Contracts Process including DocuSign Setup</b>	<b>9</b>	<b>8.25 days</b>	<b>3/4/20</b>	<b>3/16/20</b>	
Design	2	0.25 days	3/4/20	3/4/20	CDI BPC,Client PM,Client Stakeholders
Development	4	5 days	3/5/20	3/11/20	CDI BPC

Testing	2	2 days	3/12/20	3/13/20	CDI BPC,Client PM,Client Stakeholders
Deployment includes End User Training	1	1 day	3/16/20	3/16/20	CDI BPC,Client PM,Client Stakeholders
<b>Public Web and Forms Portals</b>	<b>16</b>	<b>8.25 days</b>	<b>3/17/20</b>	<b>3/27/20</b>	
Design	2	0.25 days	3/17/20	3/17/20	CDI BPC,Client PM,Client Stakeholders
Development	8	5 days	3/17/20	3/24/20	CDI BPC
Testing	4	2 days	3/24/20	3/26/20	CDI BPC,Client PM,Client Stakeholders
Deployment includes Administrator Training	2	1 day	3/26/20	3/27/20	CDI BPC,Client PM,Client Stakeholders
<b>Laserfiche Integration: ArcGIS</b>	<b>4</b>	<b>8.25 days</b>	<b>3/27/20</b>	<b>4/8/20</b>	
Design	1	0.25 days	3/27/20	3/27/20	CDI BPC,Client PM,Client Stakeholders
Development	1	5 days	3/27/20	Fr 4/3/20	CDI BPC
Testing	1	2 days	4/3/20	4/7/20	CDI BPC,Client PM,Client Stakeholders
Deployment includes Train-the-Trainer demonstration	1	1 day	4/7/20	4/8/20	CDI BPC,Client PM,Client Stakeholders
<b>Laserfiche Integration: CityWorks</b>	<b>15</b>	<b>8.25 days</b>	<b>3/27/20</b>	<b>4/8/20</b>	
Design	2	0.25 days	3/27/20	3/27/20	CDI BPC,Client PM,Client Stakeholders
Development	10	5 days	3/27/20	4/3/20	CDI BPC
Testing	2	2 days	4/3/20	4/7/20	CDI BPC,Client PM,Client Stakeholders
Deployment Deployment includes Train-the-Trainer demonstration	1	1 day	4/7/20	4/8/20	CDI BPC,Client PM,Client Stakeholders
<b>Stage VI - End User Training &amp; Follow Up Training</b>	<b>10</b>	<b>10 days</b>	<b>4/8/20</b>	<b>4/22/20</b>	
Training Sessions Laserfiche Client Administrator Training Workflow Design Training E-Forms Design Training Records Management API Classes /Design	10	10 days	4/8/20	4/22/20	CDI Trainer,Client Implementation Team,Client Stakeholders
<b>Close Out</b>	<b>0</b>	<b>4 days</b>	<b>4/22/20</b>	<b>4/28/20</b>	
Distribute Project Close Out Form	0	1 day	4/22/20	4/23/20	CDI PM
Sign & Return Project Close Out Form	0	3 days	4/23/20	4/28/20	Client PM

### ONGOING SUPPORT

The initial purchase of a Laserfiche software system also requires purchasing LSAP for each component. LSAP is a software assurance program initiated by Laserfiche to ensure that clients receive regular product updates and basic software support through their value-added reseller. CDI has developed this policy with regard to services

Phone number for problem reporting	855-714-2800, Option 1 for Tech. Support
Renewable Annual Technical Support	Fee is fixed based on software components that have been purchased and installed. Renewable each year.
Telephone and Email Support	support@citiesdigital.com 855-714-2800, Option 1 for Tech. Support Hours: 8:00AM-7:00PM CST Website support: <a href="http://www.citiesdigital.com">www.citiesdigital.com</a> Hours 24-hours
Response Time and Definition	Responses provided within 4 hours of initial report. However, usually phone calls and web chats are answered immediately.  Responses consist of diagnosing the problem and if possible resolving it immediately or over the telephone. If not possible to resolve immediately a time will be set up to try and resolve the problem at the client's convenience.
Options for Coverage During Non-PPM Periods	This can be made available upon request for an hourly fee.
Capability for Remote Diagnostics	We use a web-based tool for remote diagnostics and support. It requires a web browser and internet connection but no other software or hardware.
Maintenance Cost for Fixes and Major Releases	Maintenance that is done over the phone or remote access is included in annual maintenance agreement at no additional cost. Most minor upgrades can be completed this way. Upgrades are often available for download from our FTP site, making delivery time zero.  Major upgrades may be subject to a fee if the platform has changed. The fee is set when the new version is released.  New operating system releases are almost always handled through minor patches that make existing software compliant. These are completed within months after the new operating system is released and before most clients have a chance to upgrade their OS.
Support Escalation Procedures	<ol style="list-style-type: none"> <li>1. Problem is reported and resolved over the phone or remotely.</li> <li>2. If immediate resolution is not possible, problem is reported to Laserfiche corporate tech support. Cities Digital works with Laserfiche to find and implement a solution.</li> <li>3. If there is no existing solution, Laserfiche corporate tech support will write a script or solution to fix the problem. Cities Digital will then implement the solution remotely or through onsite support if necessary.</li> <li>4. Cases are updated daily at a minimum.</li> </ol>
Tracking Database	We use a support tracking software. Our tracking software assigns incident numbers and clients are able to call and get the status on any support case at any time during work hours.

that are included with the purchase of LSAP in order to serve all clients with the utmost accuracy and efficiency.

The Cities Digital support team consists of seven Laserfiche trained support technicians. All technicians are highly skilled, Laserfiche Gold Certified and trained in providing support services for the entire Laserfiche product suite.

It's worth noting that many Laserfiche customers have chosen to switch their support to Cities Digital from other vendors after hearing about the excellent support and consulting services that Cities Digital offers. The Cities Digital commitment to providing free opportunities for clients to further their Laserfiche knowledge is a large differentiator from other solutions providers. For instance, Cities Digital hosts monthly webinars that are included in base LSAP costs, and cover a variety to Laserfiche related topics.

Please see below for the services and advantages of the Cities Digital LSAP program.

**Services covered in base LSAP costs:**

- 24-hour Cities Digital website support at [www.CitiesDigital.com](http://www.CitiesDigital.com)
- 24-hour Laserfiche website support at [www.Laserfiche.com](http://www.Laserfiche.com)
- Monthly Laserfiche User News (email newsletter with information and helpful tech tips)
- Membership in the Twin Cities User Group (only available from Cities Digital)
- Cities Digital telephone support
- Free access to Laserfiche product updates (does not include installation or training)
- Remote support via GoToAssist and GoToMeeting (allows support technicians to access client's computer remotely)
- Online support ticket submission at [CitiesDigital.com](http://CitiesDigital.com)
- Extended daily support hours for Midwest clients - 8:00AM-7:00PM CST

**Services available on a per unit basis (not included with base LSAP):**

- Installation
- Training
- Onsite support (available in packaged units by hours)
- Custom integrations
- Document conversions

## REFERENCES

Include the name, address, and contact person of at least three (3) entities (city contacts) with which the Proposer has provided similar services. The City may contact such references.

City of Everett, WA  
Steven Hellyer, IT Director  
[shellyer@ci.everett.wa.us](mailto:shellyer@ci.everett.wa.us)  
425-257-8776

City of Renton, WA  
Tien Akutagawa, IT Applications Manager  
[takutagawa@rentonwa.gov](mailto:takutagawa@rentonwa.gov)  
425-430-6886

City of Anacortes, WA  
Marcia Hunt, Assistant to the City Clerk  
[marciah@cityofanacortes.org](mailto:marciah@cityofanacortes.org)  
360-299-1960

City of Burien, WA  
Megan Gregor, City Clerk  
[megang@burienwa.gov](mailto:megang@burienwa.gov)  
206-241-4647

## APPENDIX A: SOFTWARE SUPPORT POLICY

### CDI | SOFTWARE ASSURANCE PLAN (LSAP)

The initial purchase of a Laserfiche software system also requires purchasing LSAP for each component. LSAP is a software assurance program initiated by Laserfiche to ensure that clients are able to receive regular product updates and basic software support through their value-added reseller. CDI has developed this policy with regard to services that are included with the purchase of LSAP in order to serve all clients with the utmost accuracy and efficiency.

#### SOFTWARE ASSURANCE PLANS INCLUDE:

- ✓ Unlimited phone & remote technical support\*
- ✓ Laserfiche system audit/report review
- ✓ Software installation (re-licensing)
- ✓ Product updates (version updates)
- ✓ Laserfiche development patches/hot fixes
- ✓ System architecture guidance
- ✓ Newsletters w/support & software tips
- ✓ Up to 15-minutes of free ODI Support Assistance
- ✓ ODI client portal, knowledgebase & ticketing
- ✓ Laserfiche support site
- ✓ User groups
- ✓ Monthly training webinars
- ✓ ODI express training guides

#### PROFESSIONAL SERVICES AVAILABLE (NOT INCLUDED WITH LSAP):

- ✓ Customized Training
- ✓ On-site support (packaged hours)
- ✓ Custom integrations
- ✓ Document conversions
- ✓ Product consulting & configuration
- ✓ Workflow, Forms, & System Design
- ✓ Software development services

\*Monday-Friday 8AM-7PM CT

### CDI | CONSULTING SERVICES PREPAID PACKAGES

As a service premium to its customers, CDI offers supplemental service packages to augment the basic Laserfiche Annual Software Assurance Plan (LSAP) maintenance agreement. Benefits include: reduced professional services rate and priority support with guaranteed response times.

CONSULTING SERVICES PREPAID PACKAGES	 <b>PRIORITY SUPPORT HOTLINE</b> includes priority support with guaranteed response times	 <b>CONSULTING SERVICES HOURS</b> number of hours included at discounted hourly rate	TRAVEL TIME
			<b>DIAMOND</b> \$24,000 (\$150/hr)
<b>PLATINUM</b> \$12,400 (\$155/hr)	✓	<b>80 hours*</b>	
<b>GOLD</b> \$6,400 (\$160/hr)	✓	<b>40 hours*</b>	
<b>SILVER</b> \$3,300 (\$165/hr)		<b>20 hours*</b>	
<b>BRONZE</b> \$1,750 (\$175/hr)		<b>10 hours*</b>	

**OFF-HOURS CONSULTING & SUPPORT**

- consulting services prepaid packages can be used for off-hours support and consulting services at an adjusted conversion rate
- must be scheduled two weeks in advance

**DEVELOPMENT HOURS**

- consulting services prepaid packages can be used for development services hours at an adjusted conversion rate

sales@cdi.support | www.cdi.support | 855.714.2800, ext. 2

\*Advanced services packages expire 1-year from date of purchase. | Additional hours may be purchased at a discounted rate within the service year.

## APPENDIX B: BONUS! CONTRACTS PROCESS JUMP START

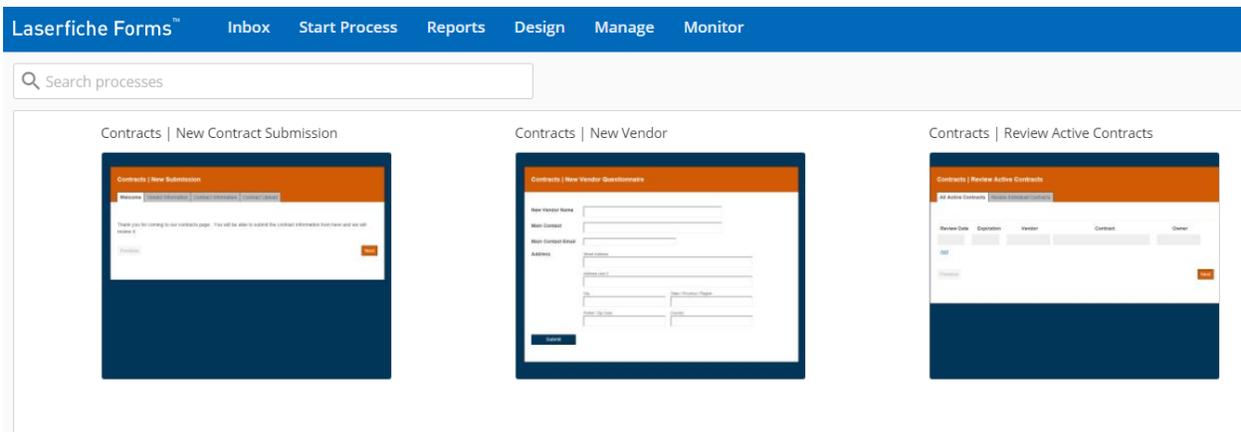
CDI has helped many clients implement a streamlined, paperless contracts process using Laserfiche. We have worked through issues with approval processes, automatic template population, and incorporating digital signatures.

Check out our Build-along video showing how part of the process is built:

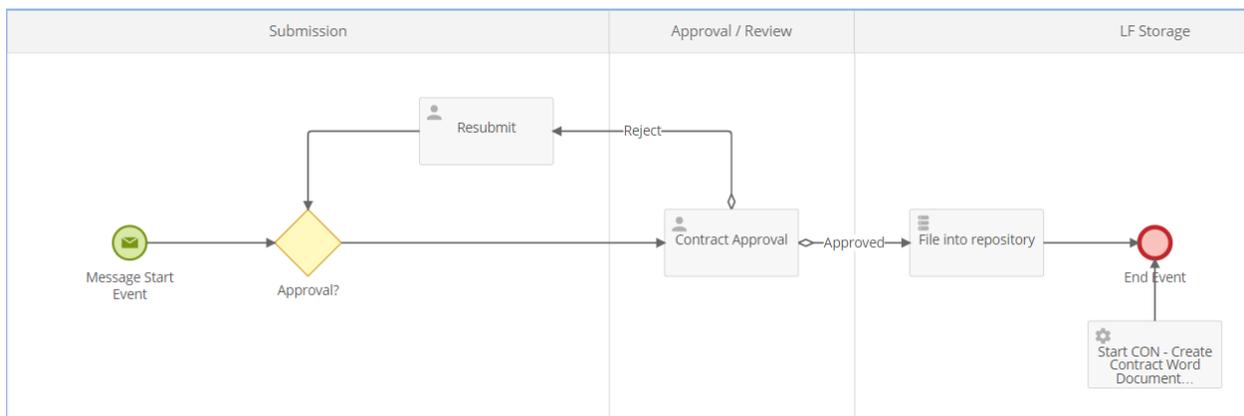
<https://www.youtube.com/watch?v=HHp6ulztsxA&t=12s>

Here are some highlights of the user-friendly features we have helped other agencies implement in contract processes.

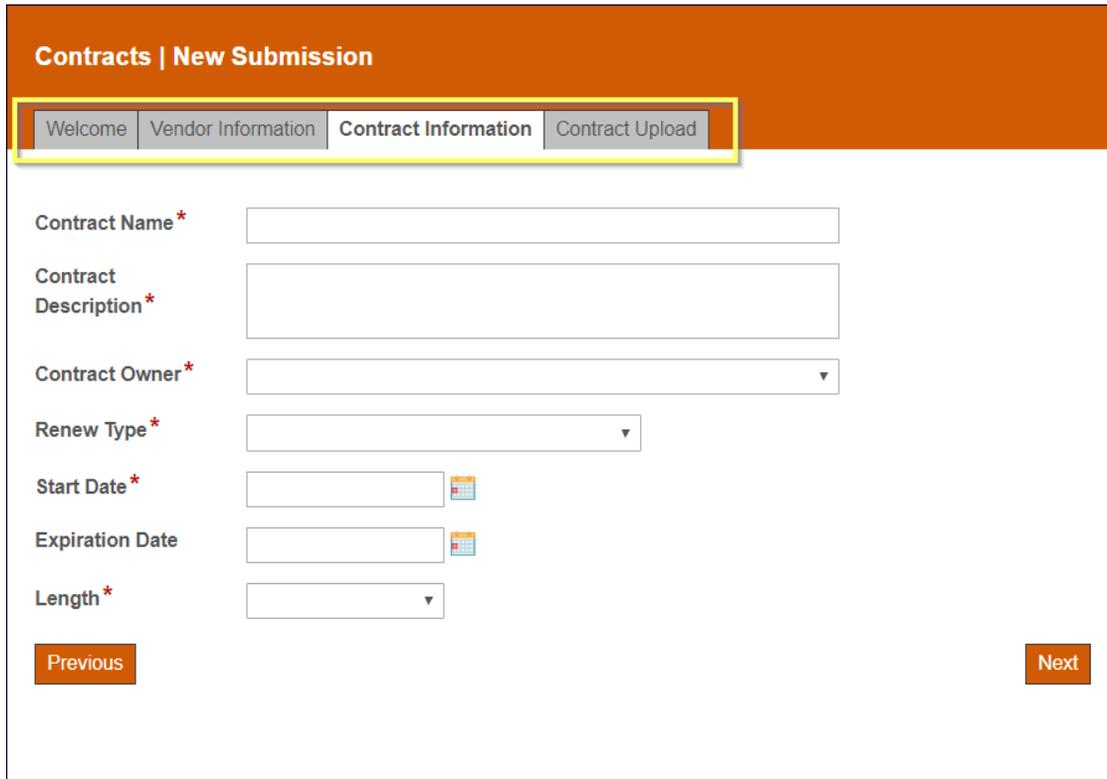
**Easy home page to access all related web forms:**



**Paperless review process that automatically tracks progress through approval:**



Split long forms into tabs for easy data entry:



**Contracts | New Submission**

Welcome Vendor Information **Contract Information** Contract Upload

Contract Name \*

Contract Description \*

Contract Owner \*

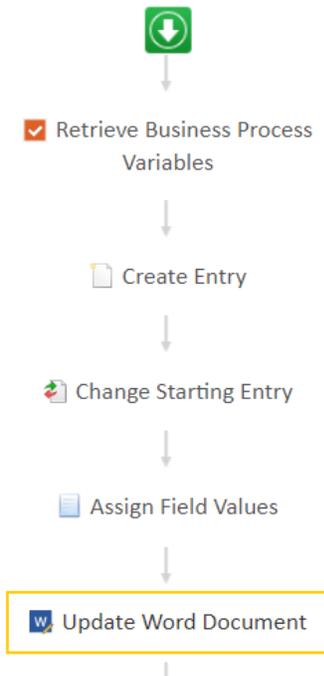
Renew Type \*

Start Date \*  

Expiration Date  

Length \*

Automatically push eform fields to a Word template with Laserfiche Workflow to avoid double-entry:



## APPENDIX C: TRAINING CATALOG

### *Laserfiche Overview Training*

<b>Course Name:</b>	Laserfiche Overview Training
<b>Duration:</b>	1 hour
<b>Type:</b>	End User Training
<b>Training Materials:</b>	A Slide show in Prezi
<b>Synopsis</b>	This course will provide an overview of the Laserfiche product suite and add-on products. The course is intended to orient users to the Laserfiche environment prior to conducting specific course training classes.

### *Laserfiche Client Training*

<b>Course Name:</b>	Laserfiche Windows Client Training
<b>Duration:</b>	1 hour 45 minutes
<b>Type:</b>	End User Training
<b>Training Materials:</b>	Cities Digital Laserfiche Windows Client 10.3 Training Guide Cities Digital Guide to Document Versioning in the Laserfiche Client Cities Digital Guide to Searching in the Laserfiche Client Cities Digital Guide to Laserfiche Snapshot.pdf EBook-GettingStartedWithLaserficheGuide-0817-Final.pdf
<b>Synopsis</b>	<p>This course will provide an overview of the Laserfiche Client, which is the main interface that end users will use to interact with the Laserfiche solution. This training is intended for both basic users as well as administrators since it lays the groundwork for core concepts and actual use of the system.</p> <p>Laserfiche Windows Client training will be presented as though participants have little or no knowledge of the Laserfiche system.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Launching &amp; Logging into the LF Client</li> <li>• Navigating Laserfiche</li> <li>• Core concepts</li> <li>• Customizing Laserfiche</li> <li>• Basic Laserfiche actions</li> <li>• Interacting with files</li> <li>• Scanning into Laserfiche</li> <li>• Importing into Laserfiche</li> <li>• Searching</li> <li>• Printing, emailing, and exporting documents</li> <li>• MS Office Integration</li> <li>• Laserfiche Snapshot printer</li> </ul> <p>Includes “Hands-On” exercises:</p> <ul style="list-style-type: none"> <li>• Create a new folder and Import a sample Doc to the new folder</li> <li>• Search for a document by text</li> <li>• Annotate a document in the document viewer</li> <li>• Save a Word document to Laserfiche</li> <li>• Email or export a document as a PDF and set the password</li> </ul>
<b>Recommended Students per class:</b>	10 or less

*Administration Console Training*

<b>Course Name:</b>	<b>Laserfiche Administration Console Training</b>
<b>Duration:</b>	1.0 hour 15 minutes
<b>Type:</b>	Administrator Training
<b>Training Materials:</b>	Cities Digital Laserfiche Administration Console Guide Cities Digital Laserfiche Web Administration Console Training Guide 10.3
<b>Synopsis</b>	<p>This course will provide an overview of the Laserfiche Administration Console, which is the interface used to administer basic components of the Laserfiche solution. This training is not intended for all users, but rather, those that will be designated as system administrators.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Launching &amp; logging into the Administration Console</li> <li>• User and Group creation/management</li> <li>• Metadata creation/management</li> <li>• Recycle bin management</li> <li>• Volume management</li> <li>• Indexing</li> <li>• Auditing (if applicable)</li> <li>• Advanced repository options</li> </ul> <p>Includes “Hands-On” exercises:</p> <ul style="list-style-type: none"> <li>• Create a new Laserfiche user and set basic feature rights</li> <li>• Create a new Windows user and set basic feature rights</li> <li>• Create a new group and add a user to the group</li> <li>• Create a new field and a new template</li> <li>• Add the new field to the new template</li> <li>• Change the order of the field on the template</li> </ul>
<b>Recommended Students per class:</b>	5 or less

*Laserfiche Web Administration Console Training*

<b>Course Name:</b>	<b>Laserfiche Web Administration Console Training</b>
<b>Duration:</b>	1 hour 15 minutes
<b>Type:</b>	Administrator Training
<b>Training Materials:</b>	Cities Digital Laserfiche Web Administration Console Training Guide 10.3
<b>Synopsis</b>	<p>This course will provide an overview of the web-based Laserfiche Administration Console, which is the interface used to administer basic components of the Laserfiche solution. This training is not intended for all users, but rather, those that will be designated as system administrators.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Navigating to the Web Access URL</li> <li>• User and Group creation/management</li> <li>• Metadata creation/management</li> <li>• Recycle bin management</li> <li>• Volume management</li> <li>• Indexing</li> </ul>

	<ul style="list-style-type: none"> <li>• Auditing (if applicable)</li> <li>• Advanced repository options</li> </ul> <p>Includes "Hands-On" exercises:</p> <ul style="list-style-type: none"> <li>• Create a new Laserfiche user and set basic feature rights</li> <li>• Create a new Windows user and set basic feature rights</li> <li>• Create a new group and add a user to the group</li> <li>• Create a new field and a new template</li> <li>• Add the new field to the new template</li> <li>• Change the order of the field on the template</li> </ul>
<b>Recommended Students per class:</b>	5 or less

### *Laserfiche Directory Server Training*

<b>Course Name:</b>	<b>Laserfiche Directory Server Training</b>
<b>Duration:</b>	1.0 hours
<b>Type:</b>	Administrator Training
<b>Training Materials:</b>	Cities Digital Laserfiche Directory Server 10.3 Guide
<b>Synopsis</b>	<p>This course will provide an overview of the Laserfiche RIO Directory Server, which is the interface used to administer Laserfiche RIO server applications and user licenses from one location. This training is not intended for all users, but rather, those that will be designated as system administrators of a RIO system.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Launching &amp; logging into the Directory Server Console</li> <li>• Global Settings</li> <li>• Server applications and allocations</li> <li>• User allocations and configurations</li> </ul>
<b>Recommended Students per class:</b>	5 or less

### *Laserfiche Security Training*

<b>Course Name:</b>	<b>Laserfiche Security Training</b>
<b>Duration:</b>	1 hour
<b>Type:</b>	Administrator Training
<b>Training Materials:</b>	<p>Introduction to Laserfiche Security</p> <p>Scope in Laserfiche Security</p> <p>Security Tags in Laserfiche 10</p>
<b>Synopsis</b>	<p>This course will provide an overview of the various considerations to be made when setting up user, group, document, and folder security in Laserfiche. This training is not intended for all users, but rather, those that will be designated as system administrators.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• User and Group Rights/Privileges</li> <li>• Service Accounts</li> <li>• Template and Field security</li> </ul>

	<ul style="list-style-type: none"> <li>• Security Tags</li> <li>• Volume security</li> <li>• Folder Access Rights</li> <li>• Access scope options</li> </ul>
<b>Recommended Students per class:</b>	5 or less

*Laserfiche Scanning Training*

<b>Course Name:</b>	<b>Laserfiche Scanning Training</b>
<b>Duration:</b>	30 minutes
<b>Type:</b>	End User Training
<b>Training Materials:</b>	Cities Digital Laserfiche Scanning Step-by-Step.pdf
<b>Synopsis</b>	<p>This course will provide an overview of the Laserfiche Scanning interface, which is launched from within the Laserfiche Client and Web Access interfaces. This training is intended for end users who have desktop scanners and will be physically scanning documents into the system through the interface.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Launching the Laserfiche Scanning interface</li> <li>• Scan source options</li> <li>• Default properties</li> <li>• Configuring software &amp; hardware image enhancements</li> <li>• Initiating a scan</li> <li>• Batch processing</li> <li>• Storing to Laserfiche</li> <li>• Advanced properties</li> </ul> <p>Includes “Hands-On” exercises:</p> <ol style="list-style-type: none"> <li>1. Launch scanning and choose Basic mode <ul style="list-style-type: none"> <li>• Set OCR options - Balance</li> <li>• Set Enhancements: Blank page removal, Deskew &amp; Despeckle</li> </ul> </li> <li>2. Launch scanning and choose Standard mode <ul style="list-style-type: none"> <li>• Set default name and template</li> <li>• Change folder path</li> <li>• Add enhancements: Blank Page removal, Deskew, &amp; OCR</li> <li>• Scan a multi-page doc and Split into two docs</li> </ul> </li> </ol>
<b>Recommended Students per class:</b>	10 or less

*Web Client Training*

<b>Course Name:</b>	<b>Laserfiche Web Client Training</b>
<b>Duration:</b>	1 hour
<b>Type:</b>	End User Training
<b>Training Materials:</b>	Cities Digital Web Client User Training Guide 10.4 Cities Digital Laserfiche Mobile 10.2 Guide
<b>Synopsis</b>	This course will provide an overview of the Laserfiche Web client, which is a web-based “thin client” interface that that allows users to interact with the Laserfiche solution. The

	<p>Web client provides functionality that is extremely similar to the Laserfiche Windows Client interface, but through a web browser.</p> <p>Users will have the ability to search, import and interact with files and entries in a full read/write capacity. During this training course users will become familiar with the features and functionality of the web-based client.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Navigating to the Web Client URL</li> <li>• Logging into the repository</li> <li>• Navigating the browser</li> <li>• Browser Toolbar</li> <li>• Interacting with electronic files &amp; TIFF images</li> <li>• Scanning into the Web Client</li> <li>• Importing into the Web Client</li> <li>• Search</li> <li>• Printing, emailing and exporting documents</li> </ul>
<b>Recommended Students per class:</b>	5 or less

*Workflow Designer Training*

<b>Course Name:</b>	Laserfiche Workflow Designer Training
<b>Duration:</b>	1.75 hours
<b>Type:</b>	Administrator Training
<b>Training Materials:</b>	Cities Digital Laserfiche Workflow 10.4 Training Guide
<b>Synopsis</b>	<p>This course will provide an overview of the Laserfiche Workflow Designer, which is the interface where workflows and business processes are created and managed. Laserfiche Workflow is an extremely important and powerful component of the product suite since it provides the ability to build repeatable patterns of activity that can be completely automated or dependent on end user interaction.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Launching the Workflow Designer</li> <li>• Preparing a new workflow for configuration</li> <li>• The Activity Toolbox</li> <li>• Workflow Design within the GUI</li> <li>• Building a sample workflow</li> <li>• Publishing a workflow</li> <li>• Defining Starting Rules</li> <li>• Search and Search Results</li> </ul> <p>Includes “Hands-On” exercises:</p> <ul style="list-style-type: none"> <li>• Create a new workflow and set the Repository profile connection</li> <li>• Add a workflow activity and set its properties</li> <li>• Publish a workflow</li> </ul>
<b>Recommended Students per class:</b>	5 or less

*Audit Trail Training*

<b>Course Name:</b>	<b>Laserfiche Audit Trail Training</b>
<b>Duration:</b>	45 minutes
<b>Type:</b>	Administrator Training
<b>Training Materials:</b>	Cities Digital Audit Trail Guide 10.2
<b>Synopsis</b>	<p>This course will provide an overview of Laserfiche Audit Trail, which is a module that monitors and records events that occur within your Laserfiche repository and Administration Console. Within the interface of the module, specified users have the ability to report on recorded events.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Launching and accessing Audit Trail</li> <li>• Permissions</li> <li>• Creating a new report</li> <li>• Configuring Report Definitions</li> <li>• Configuring Event Filters</li> <li>• Utilizing Report Data</li> <li>• Saving a report</li> </ul>
<b>Recommended Students per class:</b>	5 or less

*Laserfiche Forms Training*

<b>Course Name:</b>	<b>Laserfiche Forms Training</b>
<b>Duration:</b>	1.25 hours
<b>Type:</b>	Administrator Training
<b>Training Materials:</b>	Cities Digital Laserfiche Forms 10.3.1 Training Guide
<b>Synopsis</b>	<p>This course will provide an introduction and overview of Laserfiche Forms, which is an e-Forms solution that allows organizations to collect and route information within a web-based environment. The Forms solution also interacts with Laserfiche repositories.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Launching Forms</li> <li>• User Inbox</li> <li>• System Security</li> <li>• Creating a New Process</li> <li>• Designing a Form</li> <li>• Configuring a Form's Theme</li> <li>• The Forms Process Modeler</li> <li>• Publishing a Form</li> </ul> <p>Includes "Hands-On" exercises:</p> <ul style="list-style-type: none"> <li>• Create a new business process by using a template</li> <li>• Edit the form and add a new field, preview the new form</li> <li>• Publish the new business process and change the URL of the link</li> </ul>
<b>Recommended Students per class:</b>	5 or less

*Records Management Training*

<b>Course Name:</b>	<b>Laserfiche Records Management Training</b>
<b>Duration:</b>	1.0 hours
<b>Type:</b>	Administrator Training
<b>Training Materials:</b>	Cities Digital Laserfiche Records Management Guide 10.0
<b>Recommended Students per class:</b>	5 or less
<b>Synopsis:</b>	<p>This course will provide an overview of Laserfiche Records Management, which is a tool that allows organizations to formalize records management plans and policies within the Laserfiche repository. Training will focus on the administrative configuration steps that are necessary to prepare the repository for records management use and should include individuals with organizational records management knowledge.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Record Management Concepts &amp; Terminology</li> <li>• Creating Retention Schedules</li> <li>• Creating Cutoff Instructions</li> <li>• Creating Cycle Definitions &amp; Locations</li> <li>• Creating Records Series and Record Folders</li> <li>• Application of Cutoff and Retention Policies</li> <li>• Records Management Searches</li> <li>• Executing Records Management actions</li> </ul>

*WebLink Administration Training*

<b>Course Name:</b>	<b>Laserfiche WebLink 10 Administration Training</b>
<b>Duration:</b>	1.0 hours
<b>Type:</b>	Administrator Training
<b>Training Materials:</b>	Cities Digital Laserfiche WebLink 10.0 Designer Guide.pdf
<b>Synopsis:</b>	<p>This course will provide an administrative overview of Laserfiche WebLink, which is a read-only web-based public portal option for accessing a Laserfiche repository. Administration training will focus on the initial configurations necessary to customize WebLink for internal or public read-only access.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Accessing the WebLink administration tools</li> <li>• Utilizing the WebLink Administrator’s Utility             <ul style="list-style-type: none"> <li>- Creating virtual directories</li> <li>- E-Mail</li> <li>- Search Highlights</li> </ul> </li> <li>• Utilizing the WebLink Designer             <ul style="list-style-type: none"> <li>- Creating Themes</li> <li>- Welcome Page</li> <li>- Custom Search Forms Designer</li> <li>- Navigation</li> </ul> </li> <li>• Utilizing the WebLink Settings Bundler</li> </ul>
<b>Recommended Students per class:</b>	5 or less

*WebLink User Training*

<b>Course Name:</b>	<b>Laserfiche WebLink User Training</b>
<b>Duration:</b>	30 minutes
<b>Type:</b>	End User Training
<b>Training Materials:</b>	Cities Digital Laserfiche WebLink 10.3 Designer Guide
<b>Synopsis</b>	<p>This course will provide an end user overview of Laserfiche WebLink, which is a read-only web-based public portal option for accessing a Laserfiche repository. User training will focus on accessing and utilizing WebLink to search and review documents within the repository.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Navigating to the WebLink URL</li> <li>• Utilizing preconfigured search and links on the welcome page</li> <li>• Browsing through folders in WebLink</li> <li>• Utilizing WebLink Search capabilities</li> <li>• Viewing, printing and exporting documents</li> </ul>
<b>Recommended Students per class:</b>	20 or less

*WebLink Advanced Customization Training*

<b>Course Name:</b>	<b>WebLink Advanced Customization Training</b>
<b>Duration:</b>	1 Hour
<b>Type:</b>	Administrator Training
<b>Training Materials:</b>	Cities Digital Laserfiche WebLink Advanced Customization Guide.pdf
<b>Synopsis</b>	<p>This course will provide an administrative approach to customizing the WebLink site with advanced settings to provide alternative methods of presenting information to end users.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Customizing the WebLink URL / Multiple URL links</li> <li>• Hiding / customizing items on the welcome page</li> <li>• Setting default views in WebLink</li> <li>• Custom Sorting in WebLink Searches</li> <li>• Setting a Grid View for Search results</li> <li>• ...and more!</li> </ul>
<b>Recommended Students per class:</b>	20 or less

*Import Agent*

<b>Course Name:</b>	<b>Laserfiche Import Agent Training</b>
<b>Duration:</b>	30 minutes
<b>Type:</b>	Administrator Training
<b>Training Materials:</b>	Cities Digital Laserfiche Import Agent 10.3.1 Guide
<b>Synopsis</b>	<p>This course will provide an overview of Laserfiche Import Agent which lets you automatically files stored in a Windows folder and import them into a Laserfiche repository. Training should result in an administrator’s ability to setup, configure and monitor Import Agent profiles.</p> <p>Training will include review of:</p> <ul style="list-style-type: none"> <li>• Opening the Import Agent Configuration Utility</li> <li>• Creating a profile</li> <li>• Configuring and Editing a profile</li> <li>• Setting Import Agent Options</li> <li>• Configuring Email Archiving</li> <li>• Best Practices and troubleshooting</li> </ul>
<b>Recommended Students per class:</b>	5 or less