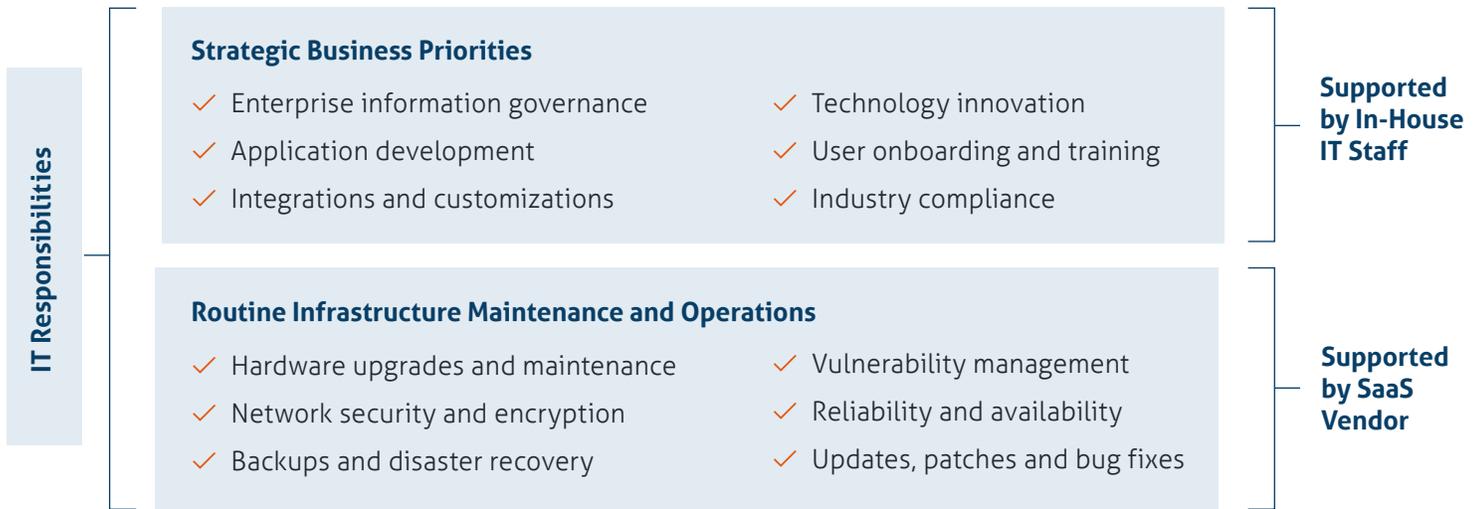# The Advantages of Moving ECM to the Cloud

Cloud technologies have dramatically shifted how IT departments across the globe approach deploying enterprise software. By offloading the traditional hardware and software maintenance required for on-premises systems, IT can better concentrate on delivering high value solutions. With impact that extends beyond IT, cloud platforms have transformed entire industries, bringing significant advantages that make it easier to stay agile, drive innovation and modernize the enterprise.

Cloud Hosting Frees Up IT Resources

IT Responsibilities

Strategic Business Priorities

- ✓ Enterprise information governance
- ✓ Application development
- ✓ Integrations and customizations
- ✓ Technology innovation
- ✓ User onboarding and training
- ✓ Industry compliance

Supported by In-House IT Staff

Routine Infrastructure Maintenance and Operations

- ✓ Hardware upgrades and maintenance
- ✓ Network security and encryption
- ✓ Backups and disaster recovery
- ✓ Vulnerability management
- ✓ Reliability and availability
- ✓ Updates, patches and bug fixes

Supported by SaaS Vendor

How Software Deployments Stack Up

Self-Hosted

You manage the full stack, owning end-to-end maintenance costs for the software and hardware infrastructure.

Stack
Applications
Data
Runtime
Middleware
OS
Visualizations
Servers
Storage
Networking
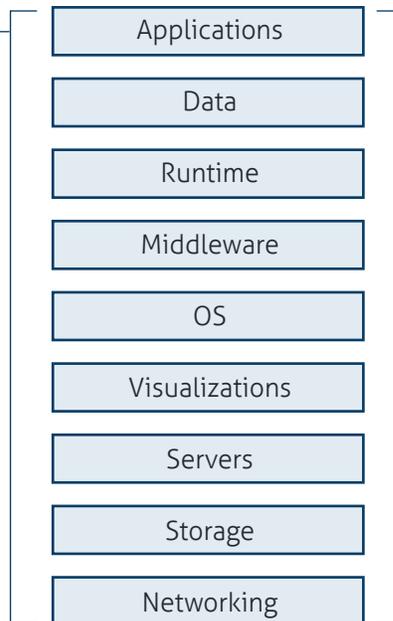
Software-as-a-Service

Deploy full applications via the internet with the entire stack managed by the SaaS vendor.

Platform-as-a-Service

Build custom apps without having to maintain underlying hardware and software.

Infrastructure-as-a-Service

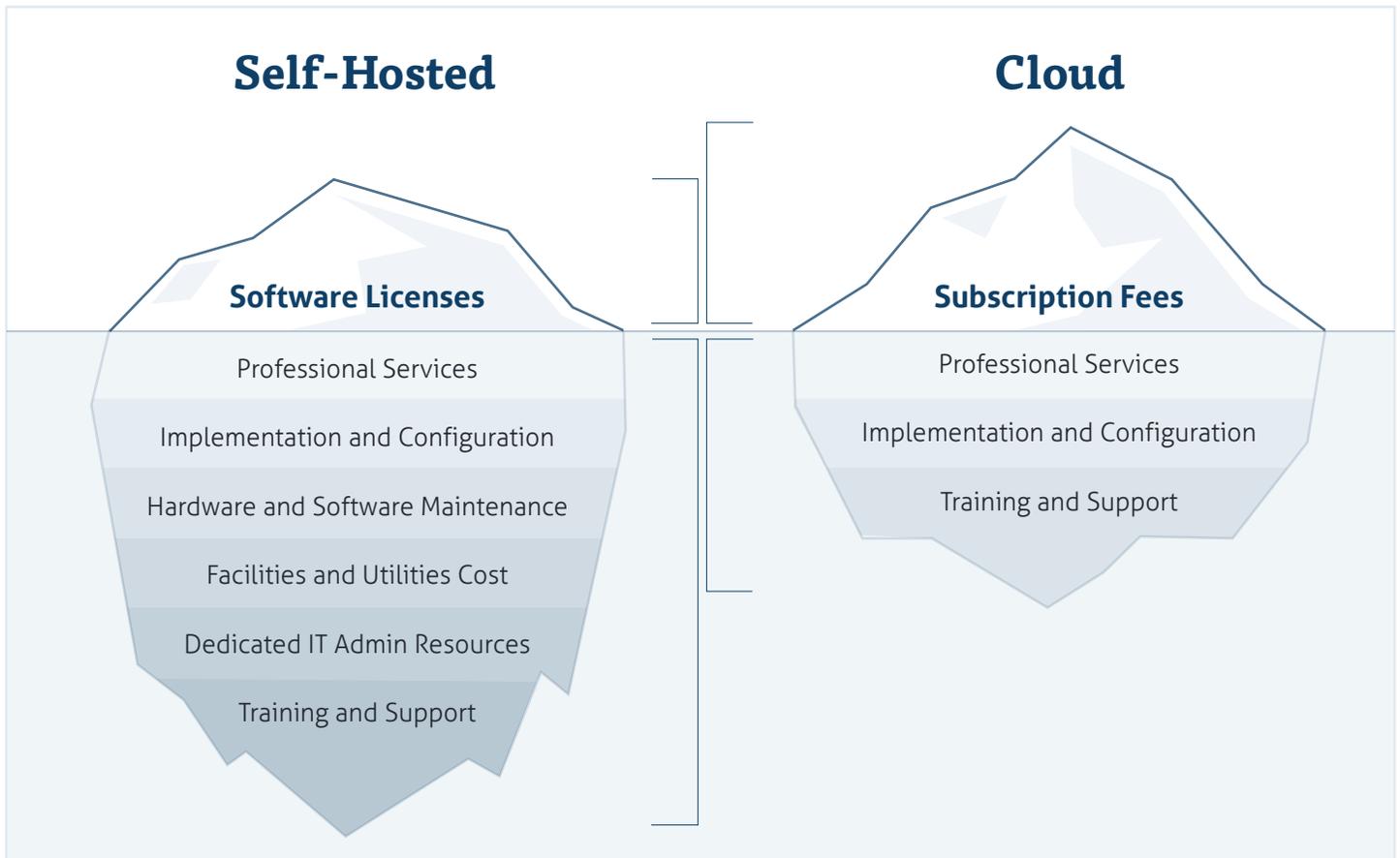Host storage, networking and computing resources through the infrastructure vendor.

Laserfiche®

Laserfiche Cloud Lowers Cost of Ownership

Before you make a choice about your Laserfiche deployment, consider how Laserfiche Cloud can reduce your costs and increase your return on investment when compared to self-hosted systems.

Self-Hosted

Software Licenses

Professional Services

Implementation and Configuration

Hardware and Software Maintenance

Facilities and Utilities Cost

Dedicated IT Admin Resources

Training and Support

Cloud

Subscription Fees

Professional Services

Implementation and Configuration

Training and Support

Why Modern Businesses are Adopting the Cloud

Reliability
SaaS apps are architected for resiliency and high availability to maintain business continuity.

Security
Leading-edge security technologies and best practices help safeguard private data.

Agility
Deliver innovative solutions rapidly without having to wait for hardware availability.

Cost Effectivenes
Reduced capital expenditures for hardware and software maintenance means lower TCO.

Scalability
Adjust subscription plans and add or remove users as business and operational needs change.

Automatic Updates
Save time and reduce downtime periods with immediate access to the latest updates.

Learn More
laserfiche.com/ecmblog/benefits-moving-ecm-cloud

Laserfiche®

Laserfiche®

Cloud vs. On-Premises Deployment: Choosing the Right Fit

One of the biggest decisions when selecting new software is whether it will be hosted on the cloud or installed on-premises. While many software providers are moving exclusively to cloud or Software as a Service (SaaS) offerings, Laserfiche offers customers the option to choose which deployment method is the right fit for their organization.

Cloud deployment
may be the right fit for you if:

- **You're looking for a lower up-front investment.** Typically, costs for cloud software are classified as an operating expense, eliminating the need to approve a large capital expenditure.

- **You don't want to invest in hardware for storage.** With cloud, storage can be added at a much lower cost and is more scalable than purchasing hardware assets.

- **You're looking for easy budgeting.** With cloud, support and maintenance costs are included in your annual contract, making budgeting easier.

- **You'd like to limit the burden on your IT organization.** Laserfiche Cloud require less in-house technical involvement for deployment, updates, and changes.

- **You'd like to automate backups to simplify disaster recovery.** Repository data is backed up every 6 hours. Database backups are encrypted and stored in Amazon S3 (Simple Storage Service). Backups are never overwritten and all backups are kept for at least 14 days. The 3 most recent backups are always retained.

- **You're looking to get started right away.** Laserfiche Cloud can typically be deployed quickly because hardware and software do not have to be installed onsite.

On-premises deployment
may be the right fit for you if:

- **You'd prefer a lower long-term cost.** Over the long term, one-time license fees and annual maintenance fees for on-premises licenses are generally lower than the cumulative recurring costs of SaaS software (not taking into account hardware and professional services). The break-even point typically occurs between two and three years after purchase.

- **You prefer greater control over your IT environment.** On-premises deployment offers complete control over infrastructure, enabling thoroughly planned and budgeted hardware technology purchases aimed to address specific expansion needs – be it security, speed, storage, etc.

- **You'd like more control over system security.** Knowledge of your system and data reside solely inhouse, which may be preferable for companies with security restrictions requiring total control over data, or who require restricting internet access to systems, databases or applications entirely.

- **You need to offer multiple access options to support your workforce, including ones that don't require internet access.** On-premises licensing offers multiple options for system access, some of which don't require internet access. This is a plus for organizations that operate in areas where internet connectivity is not reliable or restrict internet access due to security.

Laserfiche Cloud Factsheet

Laserfiche Cloud is a Software as a Service (SaaS) solution that provides a central digital repository accessible from anywhere.

☾ Deploy document management solutions via SaaS to get up and running quickly

☾ Reduce startup, infrastructure and IT administration costs

☾ Manage and control files seamlessly across your organization, regardless of where and how they are accessed

☾ Maintain compliance with robust security and auditing features

Capture Documents from Any Device

Laserfiche Cloud makes it easy to centralize paper and electronic files from multiple devices.

☾ **Scanning:** Convert paper records to imaged files on demand by connecting your scanner to Laserfiche Cloud with the Laserfiche Scanning tool

☾ **Digital Capture:** Reduce back-office work by saving to default folders with one click, auto-importing documents and automatically populating metadata

☾ **Mobile Capture:** Turn photos taken on phones and tablets into searchable, secure documents

Intuitive folder structures and a responsive user interface enable secure document access on any device.
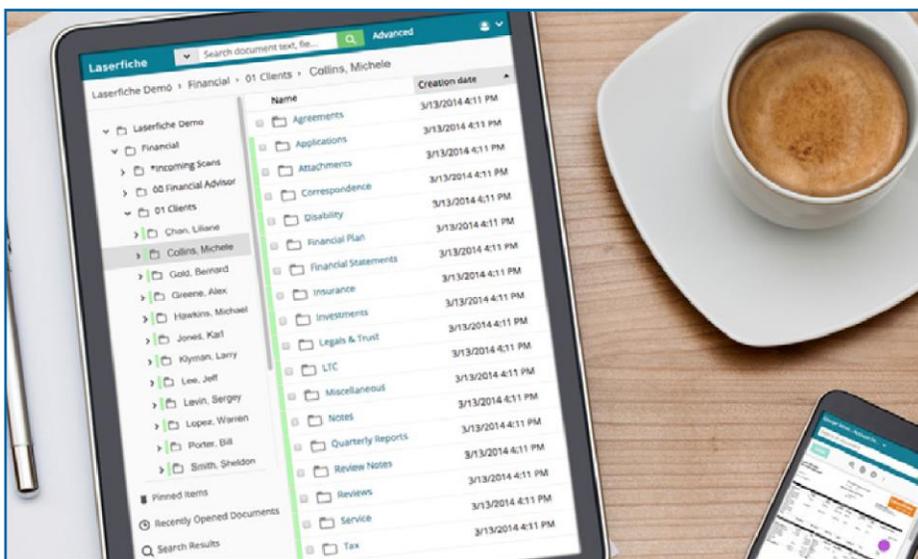
Product Highlights

☾ Upload, view and modify content in a streamlined, fully responsive web interface

☾ Create new documents and digitize existing archives

☾ Work with documents in a secure, digital document repository

☾ Facilitate compliance and reduce risk management with built-in audit reports

☾ Manage, create and set up security rights from one administrative login

☾ Connect your repository to productivity applications with builtin Microsoft Office integration

☾ Schedule bulk import and archival of paper and electronic documents

☾ Automatically share, process and update forms and customer data with the included Laserfiche Integration with Laser App®

☾ Integrate other third-party applications with one click using **Laserfiche Connector**, a code-free integration tool

Run Smarter®

Laserfiche®

Enable Rapid Adoption with User-Friendly Features

Get employees, customers, contractors and third parties using digital documents quickly with repositories that provide filtered, personalized views of files and options.

☾ **Custom User Views:** Filter by recently opened, frequently used and active documents

☾ **Rich Search:** Instantly retrieve documents with quick and advanced search options tailored to individual users' security rights

☾ **Robust Metadata:** View and modify all document metadata, annotations, fields and other modifications in a single user-friendly pane

Update documents, redact confidential information and change document metadata from one place.

Protect Documents with Robust Auditing and Security

Bring control and transparency to your operations with built-in tools that manage the use of information assets stored throughout your Laserfiche Cloud system.

☾ **Automatic Auditing:** Automatically generate reports of user actions, document access and modifications

☾ **Built-in Disaster Recovery:** Perform daily system backup powered by Amazon Web Services

☾ **Granular System Security:** Control user actions and document access down to the metadata level from a streamlined administration account

Run Smarter®

Laserfiche®

Village of Thomaston

Nassau County

Enterprise Content Management System

August 22, 2022
Valid for 3 months

Bruce Cadman
Director of Sales
518-441-6496
BCadman@generalcode.com

ICC COMMUNITY DEVELOPMENT SOLUTIONS
Formerly General Code CMS LLC

CONTENTS

INTRODUCTION

RECOMMENDED SOLUTION

Based on the Village's current needs and looking to the Village's potential future uses of electronic content management, ICC-CDS recommends implementation of Laserfiche Avante.

Laserfiche Avante is a robust system that provides the flexibility to configure the system to your specific way of doing business without your having to "shoehorn" your processes to fit the mandates of a software solution. Laserfiche is also easily expanded – to different departments, different types of documents, and many other users in the future as you see other uses.

ABOUT ICC-CDS

We set the standard for improving document management processes and are on the cutting edge of technology, providing new and reliable tools to our customers to better serve their clients. We pride ourselves in our level of experience, our technical knowledge in the industry and our focus on the customer.

ICC-CDS is a top 5 government reseller of Laserfiche in the United States, offering more than 20 years of experience, coupled with an industry-leading service, integration, training and helpdesk team.

With Laserfiche at the center of your Enterprise Content Management Solution, you get what nearly 30,000 other public and private organizations are already getting – the most powerful combination of electronic capture, storage and business process automation tools available today. We selected Laserfiche as our technology platform because of its open architecture, integration capabilities and the capacity to scale up as your demand for information sharing and access grows.

Every system designed and implemented by ICC-CDS fits your specific needs and requirements. Configuration of your Enterprise Content Management Solution to your situation reduces the time and additional resources required to "adjust" or "optimize" a one-dimensional system.

As a values-based company we adhere to the principles outlined in our "ICC-CDS." These guides for conduct are integral to building a comprehensive content management solution – one that leverages our 50+ years of service to public organizations and governments of all sizes.

Elements of our "code":

> *Digital information must be designed and implemented in ways that support the success of the entire organization.*
>
> *Our content management solutions must run on a platform that we believe in.*
>
> *The quality of our service and support determines the ultimate value of the solution we develop.*
>
> *Our content management solutions are based on the practical—if there is a better way to do something we will design and implement it.*

LASERFICHE AVANTE SYSTEM OVERVIEW

Today, successful organizations need more than document management; they need to optimize the decision-making process by getting the right content – whether structured or unstructured, paper or electronic, audio or video, photograph or e-mail – into the right hands at the right time.

Laserfiche Avante is a cutting-edge solution that combines comprehensive content management functionality with business process management (BPM) tools to both manage and process information – turning it into an asset that enables efficiency and smart decision making organization-wide. Laserfiche Avante provides all of the elements for today's comprehensive needs:

- **Document Imaging** – Converts paper documents or film into an electronic or digital format.

- **Document Management** – Manages documents (physical or digital) through their lifecycles.

- **Business Process Management** – Applies workflow technology to content-related processes in order to standardize and optimize them.

- **Integrative Middleware** – Provides many ways to interface with other business-specific applications to enable you to have <u>one</u> document repository that can be accessed from other applications and to enable "sharing" of data between other applications and Laserfiche.

The Laserfiche workflow engine gives you a platform to map, model and manage your business processes in order to obtain a better understanding of how to achieve your overall goals by:

- **Increasing productivity** by automating manual, repetitive processes.

- Modeling, executing and managing business processes **without writing code.**

- Triggering workflows based on **actions taken in Laserfiche or in 3rd party applications,** such as CRM, GIS, ERP and more.

Laserfiche Avante readily fits into your existing networked environment, without requiring custom programming or extensive hardware and software updates. Laserfiche is developed to support close integration with industry-standard operating systems and database management systems. See specifications in Appendix A for more detail.

Technology represents one of the most significant investments you make in your organization's success, and ICC-CDS and Laserfiche are committed to providing a comprehensive framework for delivering value quickly, easily and without the need to bring in expensive experts at every turn. ICC-CDS has seasoned professionals to guide you through the planning and implementation process and will be there to provide on-going support.

PRELIMINARY DOCUMENT MANAGEMENT PROJECT PLAN

I.   Upon finalization of the agreement, ICC-CDS's Project Manager will call you to review the Project Plan and discuss the following:

- Designate the main contacts for the project from ICC-CDS and your organization

- Discuss the proposed schedule and set dates

- Determine any necessary hardware purchases, installation or configuration that must take place prior to the system installation, and set a date for completion of that work

- Confirm availability of required personnel, equipment and facilities

- Address any outstanding questions, concerns or issues

II.   The Initial Design and System Implementation Phase will include the following:

- Installation and configuration of the main server components

- Installation and configuration of the named user licenses, including Laserfiche client software, Snapshot Plug-In and E-mail functionality, as well as scanner configuration and testing, if applicable

- Complete system testing of all installed components

- A file structure review and creation of a hierarchical tree structure designed to maximize efficient use of the document management system

- Discussion of file-naming conventions to be used in the document management system

- Establishment of an initial set of templates (electronic index cards)

- Configuration of users, groups and user rights (security)

- Training for users

- Administrator training for up to two (2) people who will be responsible for administration of the system

Version 9/10/11 Data Migration:

Your server and database will be upgraded. In order to complete this upgrade, you will need to provide our technical project manager with a copy of your existing database files no later than 3 days before the scheduled installation. ICC-CDS's Project Manager will work with you to determine the best way to do this.

Remote data migration will occur the day before the scheduled on-site installation and training. The requirements for remote data migration are as follows:

- Server must meet the minimum specifications. (See Appendix A.)
- Server must allow for internet access.
- Server must be rebooted after completion of the installation of the server software. ICC-CDS must be notified if this will require an off-hour reboot. If the server is not up-to-date, then note that additional reboots may be necessary.

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- IT person must be on-site to assist.
- The Laserfiche database will be unavailable to users from the start of the installation until the start of training (potentially up to 2 days).

In order to maintain the security that is currently implemented on your system, you will need to provide a list of all the Laserfiche users, including user names, full names and a list of feature rights (scan, search, print, move, create, to name a few). In addition we will need a list of all of the folders in your database and users who have access to these folders. All of this information must be provided to ICC-CDS at least 1 week prior to the installation date. Again, ICC-CDS's Project Manager will work with you to determine the most efficient way to accomplish this information transfer.

DESCRIPTION OF RECOMMENDED COMPONENTS

Laserfiche Avante™ Server Software	Laserfiche Avante MS SQL Express server software is a complete electronic content management solution with <u>fully integrated</u> business process management. Laserfiche Avante includes the Laserfiche Automated Workflow Module and other important business-process functionality "baked into" the core software. The Laserfiche Automated Workflow Module is a robust component that facilitates the flow of documents, auto-files and auto-names folders and documents and enforces time schedules, where desired, by providing e-mail reminders or notifications to backups or supervisors or by re-assigning documents to others' folders. By automating processes, you can ensure that proper process is followed, and work can be distributed to users in an orderly and predetermined manner. Laserfiche's robust security enables you to limit both access and functional rights of users. Your IT staff will appreciate the ability to set security by user or group, as well as the option to use Windows Authentication for single log-in. System administrators have access to the Laserfiche Administrator Console either in a client or a web format.
Named Users	Laserfiche named users have the ability to utilize all of the features of the software, including scanning, importing, file and volume management, search and retrieval, annotations, e-mail routing and workflow participation, as applicable and as security rights permit. Additional named user licensees can be added at any time, in any increment. **Snapshot Functionality:** The Snapshot functionality allows designated users the ability to "print" existing electronic files into the Laserfiche system directly and automatically convert them to inalterable Laserfiche images rather than having to print them out and then scan them into the system. **E-Mail Functionality:** The E-Mail Plug-in allows users to send Laserfiche documents as e-mail attachments to anyone using a MAPI-compatible E-mail system. All or part of a document can be e-mailed; multiple files can be "zipped" into one e-mail; and you can choose the format in which the documents will be sent (e.g., PDF, TIFF, JPEG, etc.). **Web Access:** Laserfiche Web Access is a browser-based thin client offering virtually all of the document management capabilities of the thick client interface. Authorized users organization-wide can simultaneously access documents, whether they are accessing Laserfiche from their desks or a remote location. IT can add new

users without installing software on individual workstations. Users access Laserfiche through a Web browser. Authorized users scan, index and otherwise manage documents with Web Access. Staff can also search, retrieve, create, move, rename and annotate documents from the Web, as well as participate in workflow processes. Web Access has real-time access to the Laserfiche repository, which means that information input into Laserfiche is instantly available to all users, whether connected directly to your server, or using Web Access. Also included with Web Access is the Laserfiche SharePoint integration. Laserfiche was the first electronic records management solution to obtain joint Department of Defense records management certification with SharePoint. Laserfiche Web Access also provides real-time access to your Laserfiche repository through the use of mobile devices. The Laserfiche iPad and iPhone apps provide impressive access, and Web Access Light is very useful for other tablets and mobile phones. Laserfiche mobile and Web Access Light are included with Web Access.

Laserfiche Mobile/App is an app that lets you capture, upload, and securely access and work with documents in and outside your Laserfiche repository while on the go. You can review and submit forms from the app as well. You can browse for documents in a folder structure; search the entire repository or a specific folder; create, copy, move, rename, sign, download, print, and delete documents; modify document fields; view annotations; submit and approve forms; view and work with offline documents and forms; and start and view business processes. Additionally, you can add documents to your repository from other apps, the mobile device's gallery, or its camera. Gallery and camera images can be processed and enhanced for easier viewing.

Laserfiche Forms Essentials comes with all Laserfiche Rio and Avante 10.2.1 installations and upgrades. All full named users can sign in to Laserfiche Forms, submit forms, access tasks, and perform any other action in Laserfiche Forms that their Laserfiche Forms security settings allow them (e.g., creating or administering business processes). These users are automatically retrieved from the Laserfiche Server and are managed on the System Security page in Laserfiche Forms. Forms Essentials Full Users have access to the core features necessary to design processes and forms. Essential Users also have access to the Operational Dashboard where they can view statistics on process in progress.

INVESTMENT DETAIL & OPTIONS

Hardware or any applicable taxes are not included in price, unless otherwise noted.

Line Item Description	Model #	Quantity	Unit Price	Total
Base Software				
Avante Server for SQL Express with Workflow	MSE10	1	$1,500.00	$1,500.00
Avante Named Full User with Snapshot, Web Access & Email	MNF16	10	$600.00	$6,000.00
			Base Software Subtotal	**$7,500.00**
Support				
LSAP Avante Server for SQL Express with Workflow	MSE10B	1	$300.00	$300.00
LSAP Avante Named Full User with Snapshot, Web Access & Email	MNF16B	10	$120.00	$1,200.00
			Support Subtotal	**$1,500.00**
Professional Services				
Laserfiche Installation and Training On-Site Days		2	$1,950.00	$3,900.00
Laserfiche Project Coordination		1	$300.00	$300.00
			Professional Services Subtotal	**$4,200.00**
Adjustments				
*Laserfiche Software Upgrade Credit		1	($4,275.00)	($4,275.00)
			Adjustments Subtotal	**($4,275.00)**
			Grand Total	**$8,925.00**

*This is a one-time credit and is estimated.

Your LSAP anniversary date will be re-aligned to reflect the date of ordering of the Laserfiche software for your new Avante system. Any remaining LSAP from your Laserfiche "Classic" system will be reflected as a credit on the project invoice.

Anticipated annual LSAP fees after the included 1ˢᵗ year for the above configuration would be $1,500.00
Note: This estimate is subject to change based upon the then-current support prices for that year.

Automated Workflow Module and Electronic Forms (software) is included with Laserfiche Avante. If/when the client wishes to implement Automated Workflow and Electronic Forms (including the Laserfiche Solution Marketplace or Business Process Library), there will be additional development, configuration and training time required. We will be happy to assess any Workflow implementation desires with you and provide any relevant fees at your request. (Fees will be based on the number and complexity of the desired workflows to be implemented.) These additional service fees would not apply until you are ready to implement this component.

1**. Adjustments to Performance Schedule; Rescheduling.**

Adjustments to Schedule. Upon the mutual consent of the Village and ICC-CDS, the "Performance Schedule" may be changed or extended as outlined below.

Rescheduling. The Village must notify ICC-CDS, in writing, immediately upon learning or otherwise becoming aware, of any difficulties that may delay the delivery of services or deliverables. Such notification must identify the reason for the delay, as well as the anticipated period of delay.

Travel-related penalties incurred by ICC-CDS due to a change in the Installation / Training schedule by the Village may be charged directly to the Village unless the delay is a result of a state of emergency.

2. **Contract Cancellation Policy.**

If the Village chooses to cancel this contract, it must do so in writing. The Village will be billed for the following contract-related expenses incurred and services provided up to the receipt of written contract cancellation, including:

- Any and all travel-related expenses incurred by ICC-CDS,
- Any and all consultation, installation and training services performed by ICC-CDS,
- Any and all software-related expenses incurred by ICC-CDS as per the Laserfiche Software Return Policy.

3. **Laserfiche Software Return Policy:**

- Unopened and not activated products can be returned within 30 days from the date of purchase at no charge.*
- Unopened and not activated products returned between 31 days to 120 days from the date of purchase will incur a 15% restocking fee on the original purchase price.*
- There is no return of products over 120 days from the date of purchase.
- There is no return of products that have been opened or activated.

Return Credit, less applicable charges, will only be given after Laserfiche receives a letter of confirmation that the software was not opened or activated.

AUTHORIZATION & AGREEMENT

The **Village of Thomaston, New York** hereby agrees to the procedures outlined above, to ICC-CDS's Content Management Solutions Terms & Conditions and to the License Agreements for the software referred to above, all of which are available at http://cms.generalcode.com/terms-conditions, and are incorporated herein by reference, and authorizes ICC-CDS to proceed with the project.

Electronic Document Management Project   **$8,925.00**
   Estimated Annual support fee second year forward (LSAP): $1,500.00
   Note: This estimate is subject to change based upon the then-current support prices for that year.

SOFTWARE ORDER, PAYMENT AND PERFORMANCE SCHEDULE

All software components will be ordered approximately three weeks prior to installation and shipped to customer. The software maintenance (annual support) will start 30 days after software order.

- $4,725.00 of the project price shall be invoiced upon the order of the software and support.
- $4,200.00 of the project price for of the installation and training shall be invoiced as completed.

(*Client please fill out*) Invoice for this Project to be sent to: Email: _____
Department: _____   Contact Name: _____

VILLAGE OF THOMASTON, NASSAU COUNTY, NEW YORK

By: _____   In the Presence of: _____

Title: _____   Title: _____

Date: _____   Date: _____

ICC-CDS, CMS, LLC

By: _____   In the Presence of: _____

Title: _____   Title: _____

Date: _____   Date: _____

In order to authorize the project:
1. *Sign the Proposal*
2. *Fax or email the Authorization & Agreement Section only to: ICCCDS@generalcode.com ● fax (585) 328-8189*
3. *Mail the signed Proposal to ICC-CDS at: 781 Elmgrove Road ● Rochester, NY 14624*
Upon request ICC-CDS can sign and mail a copy of this agreement back to the Municipality for its records.

August 22, 2022

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APPENDIX A – RECOMMENDED SERVER/WORKSTATION SPECIFICATIONS

Please click on the below links to view current specifications:

[Laserfiche Avante Minimum Recommended Hardware Specs](#)

[Laserfiche Default Ports](#)

[Virtualization Considerations for Laserfiche](#)

APPENDIX B – INSTALLATION, TRAINING AND SUPPORT

Pre-Installation Teleconference and Technical Review

Prior to the on-site installation and training, one of ICC-CDS's technicians will work with your technical staff or consultant to review the hardware and other technical requirements and ensure that all hardware is ready for the installation. We will also work with your designated contact person to establish the agenda for the on-site days.

Customized, Hands-On Training

ICC-CDS provides practical hands-on training sessions to ensure that your users keep pace with "best practices" and that your Laserfiche system continues to provide your organization with the maximum efficiencies possible. Our training experts will come on-site to your facility and provide thorough training for your staff with manuals customized to your specific system and needs. Whether you are a new Laserfiche user or an existing user seeking refresher training, we pride ourselves on maintaining a team of trainers who can relate to users at any level of expertise.

> **Our standard Laserfiche user training** covers the basic functions of the program and provides you with the necessary skills to put the system into immediate use. Based on the file organization and file naming structures that were determined by your organization, the training covers input, search and manipulation features using your documents to address file-organization and file-naming structures

> **Administrator Training** covers the system administrative functions and typically takes place throughout the on-site sessions, as appropriate.

Laserfiche Software Assurance Plan (LSAP)
LSAP is renewable on an annual basis and was created to deliver critical program updates and provide on-going technical support for your Laserfiche document management system. With LSAP you will always be confident that you are receiving the very best performance and quality possible.

> **TECHNICAL SUPPORT**

> Technical Support covers all questions that might arise with your Laserfiche system should a technical issue arise. Technical Support covers the installation of software patches and minor upgrades, as appropriate.

> The first line of technical support is via telephone, using our toll-free number (855-436-5500) or via e-mail at lfsupport@generalcode.com. With Basic LSAP service, technical support requests not immediately addressed will be acknowledged within 8 business hours, with the majority of response times within 2 hours. ICC-CDS's support technician will discuss the issue with you. If there are more detailed diagnostics needed, the technician will log into your system remotely, using the Internet. In this way, the technician can see what the user is seeing, do diagnostics, and generally remedy the situation remotely during this initial contact. In situations that require additional research or work by the technician, we will let you know what still needs to be done, along with a timeframe for getting back to you. You will also receive a Case number for future reference. By providing remote

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diagnostics and remediation to our clients, we can provide you with quick resolution of your issues to keep you up and running.

SOFTWARE PATCHES AND UPGRADES:

In addition to receiving technical support, customers with a current LSAP contract will receive **critical program updates within the current version of Laserfiche.** This is extremely important because Laserfiche is continuously improved to be even more powerful and efficient. You will receive routine system updates released by the manufacturer after a period of additional ICC-CDS in-house testing, as applicable. These patches and software upgrades are available for download at our FTP site. Customers are given the option of applying the patches themselves or having one of our Laserfiche technicians apply the patch remotely.

There is no additional cost for the installation of minor software updates or patches (typically called 'point releases'). Major software updates (typically called 'version releases') may have associated service charges to install, upgrade, or to migrate your Laserfiche software to the new major release level. Related training on new functionality of the upgraded software may also have associated service charges. Any additional charges will be outlined and quoted to you in advance.

LASERFICHE OFF-HOURS SYSTEMS UPGRADES:

At times it is a requirement that Laserfiche systems upgrades are done during off hours or over the weekend to minimize operational interruptions. ICC-CDS is happy to work with our customers to accommodate these requirements. With changes in the law regarding payment of overtime for non-exempt helpdesk staff that are involved in doing work after hours or over the weekend, they must be paid overtime. ICC-CDS is going to begin charging a nominal fee for the off-hours work to cover this new expense. The charge will not exceed $500.00 for the time involved.

Services covered under LSAP:
- Remote troubleshooting and repair to the best of our ability of any errors generated by Laserfiche
- Remote troubleshooting and repair to the best of our ability any Laserfiche functionality that is not working
- Provide and remotely apply minor patches/point releases on an as needed basis
- Respond to request calls within 8 business hours, if not immediately
- Provide technical support between the hours of 8:00 AM - 5:00 PM EST
- Provide access to all major and minor patches provided by Compulink Laserfiche
- User group meetings
- Access to Laserfiche's knowledgebase
- Access to webinars

Services not covered under LSAP:
- Training - New user or refresher training - either on-site or remote
- Repair of damaged databases

- Establishment of SQL maintenance plan

- Addition of custom features or functionality to the software

- Support or troubleshooting of third party software

- Faults or problems caused by unauthorized access to configuration information or changes to components by the user or a third party.

- Installation, Migration, Upgrading of software related to major software releases

- Problems or faults caused by use of the product outside its normal operating conditions.

- On-site technical support, unless it is specifically included as part of the selected Agreement or funded by the Customer on a per-day basis as part of a signed Change Order.

- On-site consulting or training, unless it is specifically included as part of the selected Agreement or funded by the Customer on a per-day basis as part of a signed Change Order.

Customer's Obligation:
- To maintain appropriate backups of the Laserfiche database and associated files.
- To contact ICC-CDS prior to implementing significant network changes that has the potential to impact the Laserfiche system. Some examples are, operating system changes on either the server or PC, replacement of existing PCs or server(s), and changes in network configurations, such as server name, IP address or workgroup on PCs.
- To have Internet access on the Laserfiche server and all workstations where the Laserfiche client is installed and be willing to allow our Support Technicians remote access to the Customer's Laserfiche system via GoToAssist or other acceptable remote access tool.

- To designate an IT contact and to provide the name, phone number and e-mail address on the registration form.

- To describe technical issues completely in order to provide ICC-CDS's Support Technician sufficient information to be able to diagnose and reproduce the problem, including any identified error codes.

Village of Thomaston, NY

Nassau County

Enterprise Content Management System – Cloud System

August 19, 2022
Valid for 30 days

Bruce Cadman
Director of Sales
518-441-6496
BCadman@icc-cds.com

TABLE OF CONTENTS

LASERFICHE CLOUD SITE LICENSE OVERVIEW- UNDER 10K POPULATION

The Laserfiche Cloud site license introduces a straightforward software license that includes a wide variety of features to benefit all departments of the municipality. The ICC-CDS package includes document management automation, a public portal to host public records and all training necessary to get started. All of this is hosted on Amazon Web Services, so no internal IT resources are required.

While many features and functionality are available, listed below, we start with the described base package and provide training and resources to get you started. As you become more familiar, we can add automation, integrations with 3rd party applications and more.

Laserfiche Cloud Features

Features	
Full Users	Up to 100
100 GB storage per user	✓
Document Management	✓
Audit Trail	Advanced with Watermarks
Direct Share	✓
Data Encrypted at Rest	✓
Automated and Encrypted Backups	✓
Automated Text Extraction (OCR)	✓
Import Agent with Email Archiving	✓
Connector	✓
Surveys	✓
Records Management	✓

Cloud Add-Ons	
Quick Fields Complete with Agent	10+
Workflow Bots for Process Automation	1 +
Public Portal	Unlimited ◆
Forms Portal	Unlimited ◆
Participant or Community Users	Can be Purchased
Cloud Integrations	
Microsoft 365 Integration w/ Co-Editing	✓
Integration with DocuSign	✓

*As a cloud-based system, updates and new features are automatically pushed out, no IT involvement.

Note that this Municipal Site license includes anywhere from 1-100 licenses

Annual Software and Support
On a monthly basis Laserfiche adds features and performance enhancements to an existing version of its software known as "updates." Licensee will receive all updates as released.

Additional Module Training

The Laserfiche site license comes with the ability to create online Forms and Surveys, use Laserfiche Connector to manipulate data in 3rd party programs, use Quick Fields to capture batches of documents to save time, and much more. Some of these modules are easy to learn in 1-2 hours while others may take 4-6 hours. We will work with you to determine the number of hours of training you would like and agree before proceeding with any training.

Automation Configuration with Laserfiche Process Automation Tools

Tools included with the Laserfiche Cloud include Workflow, Robotic Process Automation, online Forms, Records Management, and more. We work to understand your process and use the existing tool set to build automation suited specifically to your environment. All projects will be scoped out ahead of time and the hours/price agreed to before beginning the work.

Custom Development Work

Sometimes, custom coding and development work are required to interface with 3rd party systems. We have the expertise to scope out and tackle these projects as well.

Access to Online Support Resources

The Laserfiche Support Site contains detailed technical information to increase your product knowledgebase. The Laserfiche Cloud Help Files contain useful information to help you get started with your Laserfiche Cloud account. Laserfiche also has numerous help videos which walk you through the product to help you become more familiar and comfortable with all the different features. Additionally, Laserfiche Cloud Answers is an online forum that allows Laserfiche Cloud subscribers to collaborate on ideas and solutions.

Pricing/Services

Product	Description	Qty	Model#	Unit Price	Total Price
Cloud System	1 to 100 Full Users	1	CLXGOV10	$5,000.00	$5,000.00
Storage	100 GB per user included (Overages will be $30 per 10 GB annually) Storage is pooled and up to 10 TB	-		-	-
Configuration and Training	Onsite	2		$1,950.00	$3,900.00
Laserfiche Data Migration	On-prem to Cloud Migration	1		$500.00	$500.00
Project Coordination	Remote	1		$300.00	$300.00
Trade-In*	Trade-In Credit			-$212.76	**-$212.76**
Total					**$9,487.24**

*This is a one-time credit

This is a 3 Year Contract: Year 2 and 3 for the described Laserfiche Cloud solution: $5,000.00
Note that this Municipal Site license includes anywhere from 1-100 licenses

COMMUNITY
DEVELOPMENT
SOLUTIONS
Formerly General Code CMS LLC

AUTHORIZATION & AGREEMENT

The **Village of Thomaston, Nassau County, NY** hereby agrees to the procedures outlined above, to ICC-CDS's Content Management Solutions Terms & Conditions and to the License Agreements for the software referred to above, all of which are available at http://icc-cds.com/terms-conditions, and are incorporated herein by reference, and authorizes ICC-CDS to proceed with the project.

<u>Electronic Document Management Project</u>   **$9,487.24**

Estimated Annual support fee second year forward (SAAS): $5,000.00

If/when the client wishes to implement the additional modules included with their licenses, there may be additional development, configuration and training time required. These additional service fees would not apply until you are ready and agree to implement additional components.

<u>SOFTWARE ORDER, PAYMENT AND PERFORMANCE SCHEDULE</u>

$4,787.24 of the project price shall be invoiced upon customer site activation.
$4,200.00 of the Configuration and Training services shall be invoiced upon their completion.
$500 of the Data Migration services shall be invoices upon their completion.

(*Client please fill out*) Invoice for this Project to be sent to:
Department: _____   Contact Name: _____

VILLAGE OF THOMASTON, NASSAU COUNTY, NY

By: _____   In the Presence of: _____

Title: _____   Title: _____

Date: _____   Date: _____

ICC-CDS, LLC

By: _____   In the Presence of: _____

Title: _____   Title: _____

Date: _____   Date: _____

To authorize the project:
1. *Sign the Proposal and return to your Solutions Account Executive*
2. *Fax <u>or</u> email the Authorization & Agreement Section only to: ICCCDS@icc-cds.com ● fax (585) 328-8189*
3. *Mail the signed Proposal to ICC-CDS at: 781 Elmgrove Road ● Rochester, NY 14624*

APPENDIX A – INSTALLATION, TRAINING AND SUPPORT

Pre-Installation Teleconference and Technical Review

Prior to the installation and training, one of ICC-CDS's technicians will work with your technical staff or consultant to review the hardware and other technical requirements and ensure that all hardware is ready for the installation. We will also work with your designated contact person to establish the agenda.

Customized Training

ICC-CDS provides practical training sessions to ensure that your users keep pace with "best practices" and that your Laserfiche system continues to provide your organization with the maximum efficiencies possible. Whether you are a new Laserfiche user or an existing user seeking refresher training, we pride ourselves on maintaining a team of trainers who can relate to users at any level of expertise.

Our standard Laserfiche user training covers the basic functions of the program and provides you with the necessary skills to put the system into immediate use. Based on the file organization and file naming structures that were determined by your organization, the training covers input, search and manipulation features using your documents to address file-organization and file-naming structures

Administrator Training covers the system administrative functions and typically takes place throughout the sessions, as appropriate.

TECHNICAL SUPPORT

Technical Support covers all questions that might arise with your Laserfiche system should a technical issue arise.

The first line of technical support is via telephone, using our toll-free number (855-436-5500) or via e-mail at lfsupport@icc-cds.com   With Basic LSAP service, technical support requests not immediately addressed will be acknowledged within 8 business hours, with the majority of response times within 2 hours. ICC-CDS's support technician will discuss the issue with you. If there are more detailed diagnostics needed, the technician will log into your system remotely, using the Internet. In this way, the technician can see what the user is seeing, do diagnostics, and generally remedy the situation remotely during this initial contact. In situations that require additional research or work by the technician, we will let you know what still needs to be done, along with a timeframe for getting back to you. You will also receive a Case number for future reference. By providing remote diagnostics and remediation to our clients, we can provide you with quick resolution of your issues to keep you up and running.

SOFTWARE PATCHES AND UPGRADES:

In addition to receiving technical support, customers with a current LSAP/SAAS contract will receive **critical program updates within the current version of Laserfiche.** This is extremely important because Laserfiche is continuously improved to be even more powerful and efficient. You will receive routine system updates automatically.

Services covered under Support:
- Remote troubleshooting and repair to the best of our ability of any errors generated by Laserfiche
- Remote troubleshooting and repair to the best of our ability any Laserfiche functionality that is not working
- Respond to request calls within 8 business hours, if not immediately
- Provide technical support between the hours of 8:00 AM - 5:00 PM EST
- User group meetings
- Access to Laserfiche's knowledgebase
- Access to webinars

Services not covered under Support:
- Training - New user or refresher training - either on-site or remote
- Addition of custom features or functionality to the software
- Support or troubleshooting of third-party software
- Faults or problems caused by unauthorized access to configuration information or changes to components by the user or a third party.
- Problems or faults caused by use of the product outside its normal operating conditions.
- On-site technical support, unless it is specifically included as part of the selected Agreement or funded by the Customer on a per-day basis as part of a signed Change Order.
- On-site consulting or training, unless it is specifically included as part of the selected Agreement or funded by the Customer on a per-day basis as part of a signed Change Order.

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