

SMARTfiles

Run Smarter with SMARTfiles

979.823.7070

College Station I.S.D. Special Services

1812 Welsh

College Station, Texas 77840

Dear College Station ISD Administrators,

Thank you for allowing us to present a Laserfiche document imaging solution to your school. I have enclosed a proposal on a complete document imaging system from SMARTfiles utilizing the Laserfiche Server software for MS-SQL.

The Laserfiche Server software will allow you instant access to records with intelligent search and retrieval tools. The document imaging system provides comprehensive security to protect records from unauthorized use. All paper files, business records and electronic records, etc... can be archived in individual electronic folders with associated index card templates. We provide full text or template card search for fast retrieval on any document within the Laserfiche repository.

Listed below is a complete Laserfiche Server Software system for **3 Full Users**. The Laserfiche Server software can grow to an unlimited number of users.

Please do not hesitate to call me direct at 979-823-7070, if you have any questions. Again, thank you for allowing us this opportunity and we look forward to working together soon.

Sincerely,

Tom Bienski

SMARTfiles

"Run Smarter" with SMARTfiles

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www.smartfiles.us

SMARTfiles is a authorized reseller for Laserfiche



Authorized Reseller

SMARTfiles is a authorized TCPN Member



The Cooperative Purchasing Network

VENDOR	COMMODITY/SERVICE	Contract Number	HUB	Tex	Ark	Ari	NM	National
<u>Smartfiles</u>	Records Management Solutions	R4607	yes	Y				

SMARTfiles

Proposal To

College Station I. S. D.

For Document Management
and Electronic Records Retention System

Version 3.0

All software and installation prices are "as per the TCPN contract".

Executive Summary

The Laserfiche system purposed is simple to use and easy to understand. We will customize your system to meet your specific needs. We will train all the necessary people in using the SMARTfiles system. This includes the setup and installation of all scanners, folder structures, and index template card data files. We will fully train all end users and IT administrators to be leaders in this exciting technology. A Laserfiche system from SMARTfiles is a well designed and organized electronic filing system, and in many cases produces a positive effect in organizing all un-structured data.

This system is configured for **3 Full Users**; additional users may be added at any time. This system software includes 1-Year LSAP Premier Support – see additional LSAP Benefits on the "Notes and Requirements" page.

We have also included one (1) large production Kodak scanner and one (1) Kodak personal desktop document scanners.

Laserfiche digital archiving and stores your document text and images in industry-standard ASCII and TIFF formats. Using ASCII and TIFF formats simplifies compliance with eye-readability rules; allows easy migration of data to future storage and viewing technologies. In addition to being non-proprietary in our file structure, we can secure all common Microsoft Office application files within the Laserfiche repository – this includes Word, Excel, PowerPoint, CAD files, PDF and many others.

Authorized personnel can search and retrieve documents instantly with Laserfiche's Intelligent Search Tools. Users can view, print and e-mail documents from their desktops.

A comprehensive Standard Audit Trail security module protects your digital records archive with individualized security access privileges. Audit Trail delivers up-to-date details of user activity to demonstrate adherence to established security and retention procedures. With easy-to-generate reports, Audit Trail expedites the process of producing reports for administrators and regulatory authorities.

The final result...

With a properly designed and install system by SMARTfiles, all electronic paper documents are now secured as well as accessible for authorized personnel. The SMARTfiles system provides the tools necessary to increase productivity and cuts the cost of managing paper while improving the way people find, store and secure school records.

– Run Smarter with a SMARTfiles system

All software and installation prices are "as per the TCPN contract".

Specific Areas of Importance

Accounting

SMARTfiles can create a centralized repository for all documents in the purchasing process, including purchase orders, requisitions, invoices and checks. We can automate requisition and payment processes, routing purchase order requests and all supporting documentation through the approval process. Laserfiche allows the payables team to match incoming invoices with purchase orders, expediting the payment process and eliminating any double payment errors as well as ensuring that all discounts may be taken accordingly. Vendor inquiries regarding payment status are responded to timely and accurately.

Student Records

Maintaining, moving and protecting paper and microform for student records is expensive and time consuming. Laserfiche addresses these concerns by providing the tools to digitally archiving and process student records. The tools allow efficient access while administrators retain complete control over which documents are accessible. Comprehensive security guarantees record integrity. The Laserfiche Intelligent Search tools can retrieve documents instantly, allowing you to find and distribute documents with the speed required to keep pace with today's information demands. With flexible full text searches and customizable index field searches, records will always be accessible to administrators at a moments notice.

Critical School District Records

Critical Records are to be maintained to the highest level of security possible. Laserfiche allows for the consistent application of policies regarding this highly confidential information that can avoid costly legal ramifications. Certain regulations impose strict mandates for the release of critical or personal information. Laserfiche helps adhere to procedures for the security, records retention and disposal of electronic, physical and e-mail records.

Itemized System Pricing

Qty.	Part No.	Description	Unit Retail	Total	Notes
Laserfiche Software					
1	S30	Server Software for MS SQL	6,600.00	6,600.00	4
1	S3P	Premier Support	1,980.00	1,980.00	
User Licenses					
3	F	Full User	550.00	1,650.00	
3	FP	Premier Support	165.00	495.00	
3	PM	E-mail	80.00	240.00	7
3	PMP	Premier Support	24.00	72.00	
3	PS	Snapshot	100.00	300.00	8
3	PSP	Premier Support	30.00	90.00	
Auditing					
1	97870	Audit Trail - Standard	4,995.00	4,995.00	
1	97870UP	Premier Support	1,998.00	1,998.00	
Capture Tools					
2	QF-1	ScanConnect (NO LSAP)	165.00	330.00	
Total Software Cost:				18,750.00	
Scanners					
1	i40	Kodak i40 Desktop Scanner	1,025.00	1,025.00	
1	i160	Kodak i160 Production Scanner	3,350.00	3,350.00	
Total Hardware Cost:				4,375.00	
Installation and/or Professional Services					
0.5	IC	Pre-Implementation Consulting	1,500.00	750.00	
1	DOC	Documentation	INCLUDED	INCLUDED	
1	INSTALL	Installation per day (1 day min.)	1,000.00	1,000.00	
1	TRAIN-3	System Administration Training	1,500.00	1,500.00	
2	TRAIN-2	End-user Training per day (1 day min.)	1,000.00	2,000.00	
Total Labor:				5,250.00	
Total Price:				\$28,375.00	

All software and installation prices are "as per the TCPN contract".

Notes and Requirements

Minimum of one year LSAP must be purchased for new system.

1. Records Management Edition includes Advanced Audit Trail.
2. Laserfiche Records Management edition for Microsoft SQL is DoD 5015.2 Certified. This supports MS SQL Server 2000.
3. Laserfiche Oracle supports Oracle 9 and 10.
4. Laserfiche 6.x supports both MS SQL 7 and 2000. Laserfiche 7 supports MS SQL 2000.
5. Records management module only applies to Laserfiche 7.0.
6. Laserfiche Executive (A40) and Plus plug-in (97840) can be purchased separately in lieu of this product.
7. Email plug-in licenses must match the total number of Full user and Retrieval user licenses.
8. Snapshot licenses must match the total number of Full user licenses.
9. Web Access allows users to make changes to the database; thus, it makes use of full user licenses.
10. WebLink is a read-only retrieval viewer and makes use of retrieval user licenses.
11. Workflow (Model # WFS) includes 10 workflow users with Full user license being sold separately.
12. Workflow user licenses must match Full user licenses.
13. Agenda Manager comes with 25 Agenda Manager concurrent connections to Agenda Manager (separate from Full and Retrieval users).
14. No credit will be given for components of QF-C1 when QF-C1 is purchased.
15. Integrator's Toolkit orders must have company authorization before shipment of product.
16. A Hardware Server is required. See Server Hardware Requirements.

UPGRADE POLICY:

Software: 100% credit to the original product with current LSAP. A minimum charge of 10% of the new product is required for the upgrade.

LSAP: 100% credit to the original product, prorated for the remaining time. A minimum charge of 10% of the new product is required for the upgrade. One year of LSAP must be purchased when upgrading.

Additional Notes:

1. An application server **is not** included.
2. 1st. Year 4 hour Premier Software Support is included.
3. Premier Software Support includes SMARTfiles LSAP 4 hour remote diagnostics and support.

LSAP Benefits

1. 100% upgrade credit for existing software.
2. Routine updates and patches available for download through SMARTfiles Support Desk.
3. Access to the Laserfiche Support Site, including the Knowledge Base, white papers, training guides and user forums.
4. The option for on-site VAR support for existing Laserfiche products including preventative maintenance and user training.
5. Eligibility for user workshops and training conferences.

Server Hardware Requirements

An application file server is required.

An application server is **not** included in the proposal.

Laserfiche MS SQL Network Server requirements:

Recommended for Laserfiche MS SQL Software

- CPU: Pentium IV 2 GHz processor or faster
- Memory: 2G RAM or better
- Operating system: MS Windows Server 2003
- Database Engine: Microsoft SQL Server 2000 (service pack 3a) or 2005
- Hard Drive: 60G or better
- CD/DVD Drive: CD-RW/DVD-ROM 8X or better
- Network Card: Standard Gigabyte NIC Card
- Least Backup: CD, DVD or 2nd. Hard Drive (internal or external)
- Best Backup: RAID 1 solution - must select hard drives that have the same capacity (GB) and speed (RPM).
- Web browser: Internet Explorer 6.0

Laserfiche Client Workstation Requirements (with scanning installed):

Recommended Workstations

- CPU: 1 GHz processor or faster
- Memory: 512 MB RAM or better
- Operating system: Windows XP Professional Installed
- Web browser: Internet Explorer 6.0

Laserfiche Software

Laserfiche software acts as an electronic file cabinet where documents can be securely stored and searched, no matter their original source. It can handle a wide variety of capture formats, including: simple scanned document files, Microsoft Office application files, PDFs, and e-mails.

Laserfiche Product Suite Web Site:

<http://www.laserfiche.com/products/producttree.html>

Module Descriptions

Full User License – A Full User has the ability to add or change anything in the repository. Administration can limit this use however.

Snapshot 7 – Is a virtual print application. Laserfiche Snapshot can generate images and text from an electronic file (e.g. a Word document, a web page, a text editor, etc.). The files generated by Laserfiche Snapshot capture the content of the electronic file at the time that it was processed. In other words, they represent an accurate portrayal of an electronic file at a given point in time. The images and text created from an electronic file are then stored in a Laserfiche repository. As you can see, Laserfiche Snapshot can be used as a tool to archive a particular version of an electronic file.

Laserfiche Snapshot can process any electronic files that can be opened with a Windows application that has printing capabilities.

One license is required for each full user.

E-Mail Plug In – Allows user to e-mail information directly from the repository. One license is required for full or retrieval users.

Scan Connect – one is required for each digital scanner used on the Laserfiche system. Laserfiche ScanConnect allows ISIS scanning. A collection of ISIS scanner drivers is included with Laserfiche ScanConnect. These drivers allow images to be scanned through supported scanners.

Audit Trail Module – Data loss is often caused by someone with legitimate access to an organization's system and frequently goes undetected until it is too late to contain financial losses. With non-stop monitoring of server activity, Audit Trail is a key component of Laserfiche system security. System administrators identify usage anomalies more quickly, leading to faster resolution of problems.

Regulations concerning the protection and release of personal information continue to proliferate—HIPAA, Sarbanes-Oxley, USA Patriot Act, Gramm-Leach-Bliley, FERPA. Audit Trail delivers up-to-date details of user activity to demonstrate adherence to established security and retention procedures. With easy-to-generate reports, Audit Trail expedites the process of producing reports for administrators and regulatory authorities. Audit Trail minimizes the cost of compliance and facilitates transparency requirements.

Audit Trail tracks document-related activity to enable better assessment of business processes. Organizations isolate peak hours of repository usage, identify bottlenecks and maintain performance comparisons for different departments. Accountability and productivity rise, and quality improves.

Standard

The Standard Edition delivers more detailed reporting and configuration options. This edition is suited for organizations with a significant amount of repository activity. In addition to providing all the functionality of the Starter Edition, Standard Edition allows you to:

- Track who accesses and modifies which documents.
- Generate reports on the life cycle of documents for compliance audits.
- Save frequently viewed reports.
- Simplify the creation of reports with the
- Monitor both successful and failed actions, such as attempts to modify documents.
- Fine-tune auditing to record the actions of individual users.
- Log changes to user groups.
- Report Wizard

Implementation Plan

Time of delivery is approximately 3-4 weeks upon receipt of purchase order.

- Meeting on _____ to formalize the work plan to serve as our master schedule.
- Establish an Install Date: _____

Work Plan and Installation Responsibilities

- Development an agreement on formal work plan.
- Review Server and Client Computer Requirements (COLLEGE STATION ISD)
- Identify the File Server to be used and its Location (COLLEGE STATION ISD)
 - File Server (Name): _____
 - Location: _____
 - Key IT Assistants: _____
- Identify and Establish a File Backup procedure (COLLEGE STATION ISD and SMARTfiles)
 - _____
- Identify the Laserfiche System Administrator/s (COLLEGE STATION ISD)
 - _____
 - _____
- Identify the 3 Laserfiche Clients (COLLEGE STATION ISD)
 1. _____
 2. _____
 3. _____
- Establish the user rights and security privileges (COLLEGE STATION ISD and SMARTfiles)
- LF Software System Installation (SMARTfiles)
- Client Workstation Installation (SMARTfiles)
- Laserfiche Administrative Training (COLLEGE STATION ISD and SMARTfiles)

- Laserfiche User Client Training (COLLEGE STATION ISD and SMARTfiles)
- Project evaluation and sign off after all training and installation are complete.
- Establish future follow-up dates and times for continued -
 - system training
 - process evaluation
 - new tools and future software offerings

Our Commitment to you...

SMARTfiles has configured a turn-key electronic document management solution utilizing **Laserfiche Software**. This system is scalable and modular by design – to grow when you grow. Simply add users (Full or Retrieval Licenses) and grow from the core software.

We also protect your future by maintaining industry standards.

- Laserfiche maintains the future accessibility of documents through non-proprietary ASCII and TIFF file storage formats. We do not use proprietary file formats – although we enable you to work with and within many that are used today directly from within the Laserfiche repository.
- Laserfiche is open architecture and Universal Data Access compliant. This facilitates future integration with ODBC Compliant Information Systems.
- We support both industry-standard Microsoft SQL Server and Oracle database platforms.

In closing... SMARTfiles, Inc. delivers more than others. We provide document management solutions to help businesses overcome inefficiencies of the paper-based document processes. We have the experience and the solutions to help you easily store, retrieve and share information.

We give you the ability to choose the level of participation and we deliver the SMART tools, techniques and services. Thank you for this opportunity. We look forward to building a great business relationship with College Station Independent School District.

Thank you very much.

Sincerely,

Tom Bienski

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