INCREMENTUM
GO BEYOND PAPER

Potentia dba Incrementum

3272 Motor Avenue, Unit D

Los Angeles, CA 90034

Contact: Hedy Aref, President

Federal Tax ID#: 26-1502092

El Dorado Local Agency Formation Commission

550 Main Street, Suite E

Placerville, CA 95667

Attention: Mr. Jose C. Henriquez, Executive Officer

August 9, 2010

Dear Mr. Henriquez,

In response to El Dorado Local Agency Formation Commission's request for proposal for an "Electronic Document Management System: Design and Implementation", Incrementum is pleased to submit its proposal for the total solution. This proposal is comprised of Laserfiche electronic document management software, annual software maintenance, hardware, and professional services. In addition, pricing has been included for back file conversion services should the Agency decide to outsource the scanning, indexing, and publishing of its archives.

Our goal is to assist El Dorado Local Agency Formation Commission implement an electronic document management system that would allow the Agency to efficiently scan and import documents into a central repository. It would have the ability to store, index, search, retrieve, and distribute documents. This system would be user-friendly while providing protection against unauthorized use or access. It would streamline internal work processes and address business continuity planning in case of a disaster. Fully compatible with the Windows operating system and tightly-knit with Microsoft Office applications, Laserfiche is a Microsoft certified client/server solution that is fully compliant with records management rules and regulations.

1

EL DORADO
AUG 1 2010
LAFCO

To achieve this goal, Incrementum will deliver the following through product, technical services, and training:

1) Standardization of the filing system. El Dorado LAFCO already has a digital library of documents on the server. While not full-text or template-based searchable, these are comprised of some of the project and commission meeting files. Standardization will entail looking at the current file set-up, making recommendations on improvement for searchability from various dimensions (including being key word searchable) in the new system, and enhancement of the filing scheme for other document types that will be added to the digital library in the document management system. This standardization will facilitate back-file scanning, current documents, and documents that will be generated and received in the future.

2) Environment to go digital moving forward. In day to day operations, all incoming paper-based documents would be scanned in, indexed, and made available for search and retrieval. Comprehensive security will provide appropriate viewing privileges and functionality rights to LAFCO staff. Documents created internally will also be digitally archived (without the need to print) and searchable along with the scanned records. By going digital, El Dorado LAFCO will not only become much more streamlined, it will also see a cut in paper consumption, consumables, and other office affiliated expenses. In addition, the organization will be able to use its office space more efficiently due to elimination of physical filing space.

3) Safeguarding records in case of a disaster. By training staff on managing "portable volumes" - a feature of the Laserfiche product, Incrementum will empower the organization to practice efficient back-up and archival strategies through compact discs. This methodology can also be enhanced and used for distribution of searchable records to non-Laserfiche users .

Below, please find the summary of costs and timeline pertaining to the solution:

Software - $11,265.56

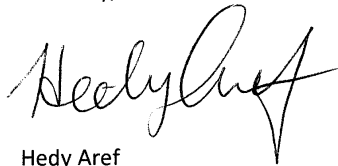Scanner and warranty - $3,546.49

Professional services- $5,100.00

Timeline for project completion- five days

Back file conversion services – Approximate Cost: $5,352.00 (Quoted separately from system)

Incrementum is an independent entity with respect to El Dorado LAFCO. The firm is an Equal Opportunity Employer, and has all the required insurance policies in force in acceptable amounts of coverage for Professional Liability, Workers Compensation, Comprehensive General Liability, and Auto (Owned and Non-Owned). Certificates of insurance coverage will be provided to El Dorado LAFCO prior to commencement of services.

2

We look forward to your review of our proposal and are confident in providing an outstanding electronic document management solution for your organization. Please contact me if you have any questions or require additional information.

Sincerely,

Hedy Aref
President
Incrementum
Tel.: (310)586-7500 x 1002
Fax: (310)693-2584
E-mail: haref@incrementum.us.com
www.incrementum.us.com

3
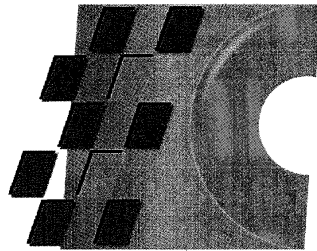
INCREMENTUM
GO BEYOND PAPER

Proposal

Electronic Document Management System:

Design and Implementation

For

El Dorado LAFCO

Table of Contents

Firm Description and Statement of Qualifications

Incrementum is a provider of document imaging and document management solutions. As an authorized integrator for the Laserfiche suite of products, our goal is to help organizations run more efficiently and become more environmentally friendly. We achieve this by reducing dependence on paper-based processes and conventional filing systems. A solution for greater efficiency entails an intersection of people, processes, and systems. Each component is critical for the success of the implementation. As the consulting integrator for the project, Incrementum's approach will ensure long-term success and vision, with short-term return on efficiency, and feasibility. This approach will be illustrated throughout the proposal.

An associate member of CALAFCO and CSDA (California Special Districts Association), Incrementum has been a contributor of articles to "The Sphere" – journal of CALAFCO, and "California Special District" – publication of CSDA. Topics have included business continuity planning and management of records as well as sustainability through electronic document management. Incrementum has also contributed to educational tracks at annual conferences of both associations.

As the host and presenter of the Electronic Document Management Workshop and Webinar Series through CSDA, Incrementum interacts with several special districts throughout the course of the year – understanding their challenges with paper-based filing systems and their needs to transition to a digital environment for greater efficiency and improved service delivery.

Incrementum also partners with the American Red Cross and co-presents the session titled: "Business As Usual – Even After a Disaster" putting great emphasis on business continuity planning and incorporating electronic document management into the overall plan of organizations.

Located in Los Angeles, CA, Incrementum services the entire state of California. Its two divisions for system implementation and scanning bureau provide the total solution for organizations looking to enhance work process efficiency and sustainability.

Proposed Scope of Services

The following overview describes the elements of the implementation process which also includes installation of the proposed system components:

Project Management

The scope of this project requires effective communication and coordination of activities between El Dorado LAFCO and Incrementum. The Incrementum project manager, in cooperation with a representative of El Dorado LAFCO will develop and maintain a project plan to outline and track project milestones and coordinate activities.

Implementation Consulting

Implementation consulting focuses on identifying the folder structure, naming conventions, template field scheme, indexing, and volume structure. This component of the project is critical in building a strong foundation for future expansion (if applicable), disaster recovery and business continuity planning, back-file conversion, and future integration with other applications (if applicable). Best practices for the structure of the electronic filing and document management system will be discussed, and upon LAFCO's approval, be applied to the implementation.

Hardware and Software Installation

Once the cosmetic and technical requirements of the system have been determined, hardware and software installation and testing will take place.

Administrator Training

At least one individual from El Dorado LAFCO needs to be trained as the designated administrator on the specifics of the system including configuring and supporting the security and indexing features of the application, back-up strategies, and data migration including portable volumes.

End-user Training

This training is designed to introduce users to the functions and operations of the Laserfiche interface, familiarize them with the steps of data capture, template use, and search functions. End-user training is very comprehensive and covers all aspects and capabilities of the solution including document imaging, electronic document management, and records management.

7

Qualifications and Related Experience of the Firm's Personnel

Incrementum's management and staff is comprised of individuals with years of experience and credibility in the world of technology and electronic document management. As a solution provider, Incrementum's project team will be communicating and working very closely with El Dorado LAFCO to ensure a fundamentally solid system addressing the short and long-term needs of the organization. Below is the list of individuals LAFCO will be closely interacting with and their relevant experience and credentials:

Hedy Aref, Project Manager and Trainer
Hedy is a twenty year veteran in the field of technology. Her experience in electronic document management goes back to 1998 when she started her employment with Laserfiche. Hands-on work with municipalities and other local government entities in California enabled her to fully understand the internal work processes and technological needs of local government. As a frequent speaker on the topic, Hedy has contributed greatly to educational sessions at various conferences including those conducted by CALAFCO, CSDA, IIMC (International Institute of Municipal Clerks) and CCAC (California City Clerks Association). Her expertise in the field awarded her the positions of Director of Government Services, and VP of Industry Solutions at Laserfiche. She also served as Manager of Service Sales with Fujitsu Computer Products of America – Imaging Products Group. Hedy is an approved instructor of the California Special Districts Association workshop and webinar series on electronic document management. Hedy will be the project manager, will conduct the implementation consulting, and provide the end-user training for El Dorado LAFCO.

Lisa Durham, Technical Engineer, Helpdesk Support Manager, and Trainer
Lisa has well over ten years of experience in a myriad of areas within information technology. Her duties have ranged from desktop support to database development and system implementation. She has been a systems analyst, an expert in business process automation, and has been directly involved with installing, managing, and maintaining Laserfiche electronic document management systems since 2001. Lisa is a certified Laserfiche administrator and has completed Admininstrator 1 and Administrator 2 exams. Lisa manages a four person helpdesk support team. She will be conducting the system installation and system administrator training.

8

<u>Jessica Smith, Technical Engineer, Helpdesk Support Specialist</u>
Jessica has been assisting with implementations and support of Laserfiche systems for over five years. Lisa is a certified Laserfiche Capture Specialist. Her expertise is in troubleshooting Laserfiche systems as well as foundation-building for automation of work processes within the Laserfiche environment.

<u>Mojy A. Bahri, Manager of Scanning Bureau</u>
Mojy has over eight years of experience in administrative management. Being responsible for all back-file conversion projects, the scanning operators and Incrementum service bureau personnel, Mojy directly supervises all aspects of the bureau's operation. Her hands-on approach, attention to detail, and expertise in capture and image quality control sets an exceptional bar for prompt project delivery and high-quality conversion services.

Related Work Experience and References

A big portion of designing and implementing a successful electronic document management solution is not just looking at immediate needs, but analyzing and setting up for future growth and/or more advanced usage. Incrementum's belief in this has affected every aspect and stage of implementation including folder structures, document naming conventions, template design, and document indexing procedures. Working with the client, Incrementum completes the implementation survey defining areas needing work process improvement, identifying security access for viewing documents/information, identifying individual roles and responsibilities, and setting up rights based on that. After installation, set-up, and standardization of the filing system, Incrementum proceeds with training end-users and system administrator(s). Below are some client references Incrementum has worked with on various levels:

LAFCO of Napa County
1700 Second Street, Suite 268
Napa, CA 94559
Tel.: (707)259-8645
Attn: Mr. Keene Simonds, Executive Officer
E-mail: ksimonds@napa.lafco.ca.gov

LAFCO for the County of Los Angeles
700 N. Central Avenue, Suite 445
Glendale, CA 91203
Tel.: (818)254-2454
Attn: Mr. Douglass Dorado, Information Systems Analyst
E-mail: ddorado@lalafco.org

Reclamation District 800
1540 Discovery Bay Blvd., Suite A
Discovery Bay, CA 94505
Tel.: (925)634-2351
Attn: Ms. Sonnet Rodrigues, Administration
E-mail: sonnet@rd800.org

City of Soledad
248 Main Street
Soledad, CA 93960
Tel.: (831)223-5014
Attn: Ms. Josie Duque, Executive Assistant to the City Manager
E-mail: jduque@cityofsoledad.com

Ventura River County Water District
409 Old Baldwin Road
Ojai, CA 93023
Tel.: (805)646-3688
Attn: Matt Bryant, General Manager
E-mail: matt@vrcwd.com

Proposed System and Cost (not including back file conversion services)

(Total Project Cost Not to Exceed $19,950.00 Including Shipping and Sales Tax)

Terms of Payment: 50% upon signing of agreement. 50% upon completion of project (refresher training to be billed separately).

Software:

Laserfiche document management platforms deliver high-volume information capture, retrieval and distribution organization wide. Laserfiche reduces misfiling, document retrieval time and costly photocopying and paper distribution – all processes that impede information access. Intelligent search provides instant document retrieval.

- Reduce labor and clerical mistakes with automated OCR and indexing
- Comprehensive security protects digital archives from unauthorized access
- Emulate paper filing structures with customizable folders and index fields
- Index electronic and image-only documents with user-defined indexes
- Digital archiving provides long-term document preservation
- Manage entire document repository from workstations
- Scan paper and import electronic files into secure digital archives of unalterable documents

<u>Document Capture</u>
Flexible capture alternatives are essential for preparing paper and electronic documents for archival, retrieval and distribution across your document management solution. The Laserfiche document imaging and management platform provides scanning and electronic document import.

Laserfiche® Snapshot Utility™

- Capture high-quality color, grayscale and black and white archival images of electronic documents for fast digital retrieval
- Eliminate printing and scanning steps from document capture processes moving forward
- Streamline filing processes by determining index field values before documents are stored in the repository
- Maintain long-term access with industry-standard TIFF Group IV storage format
- Automate population of index fields data for common information such as date, time and document name
- Cost-effective for document scanners
- Recognizes existing scanners and loads appropriate drivers

11

- Print documents directly from other applications (MS Office products, GIS) to Laserfiche while indexing them, on the fly, for search purposes.

- Maintain electronic documents in their native file format as "work in progress" or maintain documents in PDF and utilize all Laserfiche searchability techniques on these document types as well.

Distribution
Laserfiche® E-mail Plug-in™

- E-mail documents in preferred formats: PDF, JPEG, BMP, TIFF, PCX and CALS
- Export searchable PDFs
- Specify pages and/or page ranges to send
- Preserve redactions, highlights and stamps in e-mailed documents
- Send documents through any 32-bit, MAPI-compliant e-mail client, such as Microsoft Outlook® & Outlook Express®, Lotus Notes R5® and later, and GroupWise® 5.5 and later
- Send documents to anyone with e-mail access

Laserfiche Workflow

It enables organizations to automate standard, collaborative business processes, such as approvals or routing based on conditions. It transforms your static Laserfiche repository into a dynamic content management solution that ensures your business processes are performed consistently and efficiently. Proposed software comes bundled with Workflow free of charge; however, should the organization decide to incorporate the functionality into business processes, an additional consultation would be needed.

Annual Software Maintenance and Support

Incrementum's Laserfiche Software Assurance Plan (LSAP) with Expedited Response Time:
For many organizations, the key to improving operational efficiency resides in helping staff make the best use of information technology. With unlimited over the phone technical support, virtual access troubleshooting, and **one-to-four hour response time**, this plan provides **premium support** at standard cost. It also provides your organization with 24/7 access to the Laserfiche Support Site where you will find a variety of resources – from troubleshooting guides to training videos to a searchable Knowledge Base. As the technical support helpdesk under

12

this plan, Incrementum provides progressive virtual troubleshooting and support services. With the ability to log into your system (with pre-approved authorization for doing so each time), this plan drastically cuts unnecessary costs affiliated with on-site troubleshooting and support programs – not to mention the turn-around time (time saved in having users operational and up and running again). This plan also covers all necessary software <u>updates</u> for one full year.

<u>Software Price:</u>

Laserfiche Avante

Quantity	Description	Unit Cost	Amount
1	MSE10 -Laserfiche Avante Server for SQL Express with Workflow	$1,500.00	$1,500.00
1	Avante Server Software Assurance Plan	$300.00	$300.00
5	MNF05- Named Full User (E-Mail and Snapshot)	$500.00	$2,500.00
5	Named Full User Software Assurance Plan	$100.00	$500.00
1	MCS01-Laserfiche ScanConnect	$165.00	$165.00
1	ScanConnect Software Assurance Plan	$ 33.00	$ 33.00

One-time Product Licensing Sub-total:	$4,165.00
Laserfiche Software Assurance Plan (Recurring Annual Maintenance):	$833.00
Sub-total (Without Tax)	$4,998.00
Sales Tax (@ 8.50%)	$424.83
Total:	**$5,422.83**

Configuration is based on named full users. Quote has been given to accommodate usage at each of the four LAFCO office work stations with four different username and passwords. Access can be set-up using Windows authentication or designated Laserfiche username and passwords. The fifth license would be set up to serve the public to access files for research purposes. Software Assurance Plan to be renewed every year.

Additional Software Plug-In (Optional):

Laserfiche® Plus™

Optical media publishing provides simplified distribution—without the costs and inefficiencies associated with copying and transporting large amounts of paper. Laserfiche® Plus™ publishes enterprise information to CDs or DVDs, complete with integrated search and viewing capabilities that enable access on PCs without installing the Laserfiche Client™. Whether you're distributing documents to mobile staff, remote offices or clients that are not Laserfiche users, with Plus, you do it easily, and you do it royalty-free.

Archiving documents on CD or DVD is also a key aspect of disaster recovery planning. Data volumes backed up on CD can reconstruct damaged or destroyed information repositories, while the integrated search engine and viewer provide immediate access—even if other network resources remain offline.

Qty. 1	MPL01 - Laserfiche Plus Plug-in	$3,795.00
Qty. 1	MPL01B - Software Assurance Plan	$1,590.00
Sub-total:		$5,385.00
Sales Tax (@ 8.50%):		$457.73
Total:		$5,842.73

Professional Services:

Quantity	Description	Unit Cost	Total Cost
1 Day	Implementation Consulting, Filing and Folder Set-up, Template Design	$1,200.00	$1,200.00
1/2 Day	Software Installation and Testing, Scanner Installation	$600.00	$600.00
1 Day	End-user Training (on-site)	$1,500.00	$1,500.00
1/2 Day	System Administration Training	$600.00	$600.00
		Total:	$3,900.00

Discounted Refresher User Training (One Day – Onsite): $1,200.00

Laserfiche is a very user-friendly electronic document management application; however, for utmost performance,

14

we recommend a refresher session for your consideration. This follow-up course is most effective 3 – 4 weeks after the initial training. By this time, users have had hands-on experience and accumulated questions on how to accomplish certain tasks.

Any other professional services is charged at $150.00/hour.

Scanner Recommendation(s):
We realize El Dorado LAFCO is currently using a Konica Bizhub 200 for black and white documents and a Xerox DocuMate 515 for scanning color documents. These units are limited to scanning directly into PDF. and scan only in simplex, not duplex. While these two units can still be used to scan documents that would be imported into the Laserfiche system, we are making two recommendations on the ideal unit that would facilitate the needs of the organization:
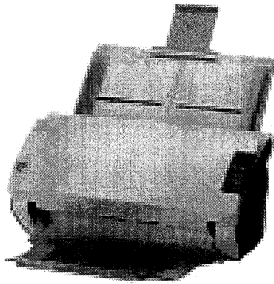

Fujitsu fi-5530C2 Sheet-Fed Scanner:

Fi-5530C2 Price: $2,571.00 + $218.54 (8.5% sales tax) + $30.00 (shipping) = **$2,819.54**

+ 9-month Advance Exchange service uplift: $670.00 + $56.95 (8.5% sales tax) =**$ 726.95**

TOTAL: **$3,546.49**

- **Output resolution**: Up to 600 dpi
- **Speed**: Captures up to 35/70 IPM in Portrait mode, 50 pages per minute (landscape, 200 dpi) in color, monochrome and grayscale
- **Paper Size**: Min ADF: 2.1" x 2.9" - Max ADF: 11.7" x 17"
- **Paper Input**: Up to 100 sheets
- **Duty Cycle**: Up to 4,000 pages per day
- **Interfaces**: Ultra SCSI 50-pin & USB 2.0

15
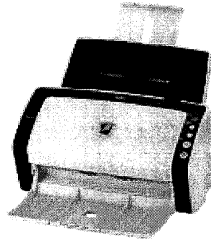
Fujitsu fi-6130 Color Scanner

fi-6130 Price: $900.00 + $76.50 (8.5% sales tax) + $20.00 (shipping) = $996.50

Includes 1 year advanced Unit Replacement – Next Business Day

- 50-page Automatic Document Feeder (ADF)
- Monochrome and grayscale scanning up to 40 ppm / 80 ipm @ 200dpi
- Color scanning up to 30 ppm / 60 ipm @ 300 dpi
- Dual color charge coupled device (CCD) image sensor
- Bundled with a full version of VRS Professional, Adobe Acrobat 8
- Standard and ScandAll Pro software
- Intelligent multi-feed function capability (manual bypass)
- Embossed card scanning (1.4 mm thickness)
- Additional features: Ultrasonic double feed-detection, continuous hard card   scanning (up to 3 cards), selectable white/black background, long document scanning.
- Hardware based JPEG compression
- Includes TWAIN and ISIS driver support
- High-speed USB 2.0 connectivity

===

Hardware Recommendations:

Incrementum is not quoting on the hardware for this project but providing recommendations on the server as well as workstations that Laserfiche will be installed on. It is recommended that Laserfiche be installed on its own dedicated server; however, if that is not possible, the below recommendations should still be taken into consideration:

Server:

    i. **CPU:** Minimum: 2.4 GHz or faster processor (Highly recommended: Intel Dual-core processor)

    ii. **Memory:** 4 GB RAM or more

    iii. Qty. two 500 GB hard drive (for mirroring) / RAID 1 / RAID 5

16

    iv. **Operating System:** Minimum: Windows XP Professional (Service Pack 2 or later), Windows Server 2003 (Service Pack 1 or later), Windows Server 2008.

    v. Tape back-up for back up purposes or other means of backing up (to be discussed in greater detail).

Client (Windows XP Professional, Vista, or Windows 7 Professional):

    i. **CPU:** 1 GHz or faster processor   Scanning Client: 2.4 GHz or faster processor

    ii. **Memory:** 256 MB RAM or more   Scanning Client: 1 GB RAM or more

    iii. **Office Integration Requirements:** Microsoft Office XP, Microsoft Office 2003 or Microsoft Office 2007

    iv. CD/DVD Burner and Software

===

Proposed Schedule

<u>Day 1:</u> Project management begins with identifying schedule of events. This includes setting up dates for implementation consulting, hardware and software installation and training. Project milestones to be determined and tracked throughout the course of the implementation.

<u>Day 2:</u> Implementation consulting, filing system set-up, and template design.

<u>Day 3:</u> 1/2 day dedicated to software installation and testing as well as scanner installation and testing. 1/2 day dedicated to system administration training. Depending on availability of LAFCO IT consultant, system administration training can be conducted on the same day as installation or on a separate day.

<u>Day 4:</u> User training (hands-on at El Dorado LAFCO offices).

<u>Day 5:</u> Refresher user training. Held 3 – 4 weeks after the initial user training.

==

17

Back-file Conversion / Scanning and Indexing Services:

Back-file conversion can be a time-consuming task for most organizations. While internal staff is encouraged to scan day forward documents on a regular basis, for institutions lacking internal resources to dedicate to back-file conversion, it is highly recommended the project be outsourced. Older documents require additional image quality control, de-skew and de-speckling and other image enhancement necessities – thus additional time and expertise needed to complete the project. Incrementum's scanning bureau has the ability and expertise to provide these services. Below, please find our quote based on El Dorado LAFCO's needs:

Description	Unit Cost
Standard, Legal Size, Ledger Size (up to and including 11" x 17") Document Preparation (disassembly, sorting, reassembly) Scanning, Image Quality Control, Indexing	11 cents/page*
Large format documents (maps & blueprints) Document Preparation, Scanning, Image Quality Control, Indexing	$1.30 / page*

Page is defined as one image. A double-sided document would be counted as two pages as it has two images.

Folder structure, template design, and indexing scheme is included in the above price and will be synchronized with the structure and design of the live system LAFCO would be implementing. The folder structure, digital documents and template information will be delivered to LAFCO on CD-R or DVD-R (depending on preference).

CD Creation:
First Copy: $50.00 per CD (search engine published on each individual CD for disaster recovery)
Second Copy or more: $25.00 per CD (search engine published on each individual CD for disaster recovery)

DVD Creation:
First Copy: $75.00 per DVD (search engine published on each individual DVD for disaster recovery)
Second Copy or more: $25.00 per DVD (search engine published on each individual DVD for disaster recovery)

Transportation (one-way/per trip) $300.00

Minimum number of filing cabinets' worth of documents transported per trip: 15 Bankers' Boxes - approximately 38,000 pages.

Back file Conversion Terms of Payment: Payment due upon completion of project.

18

Laserfiche® Document Management Solutions
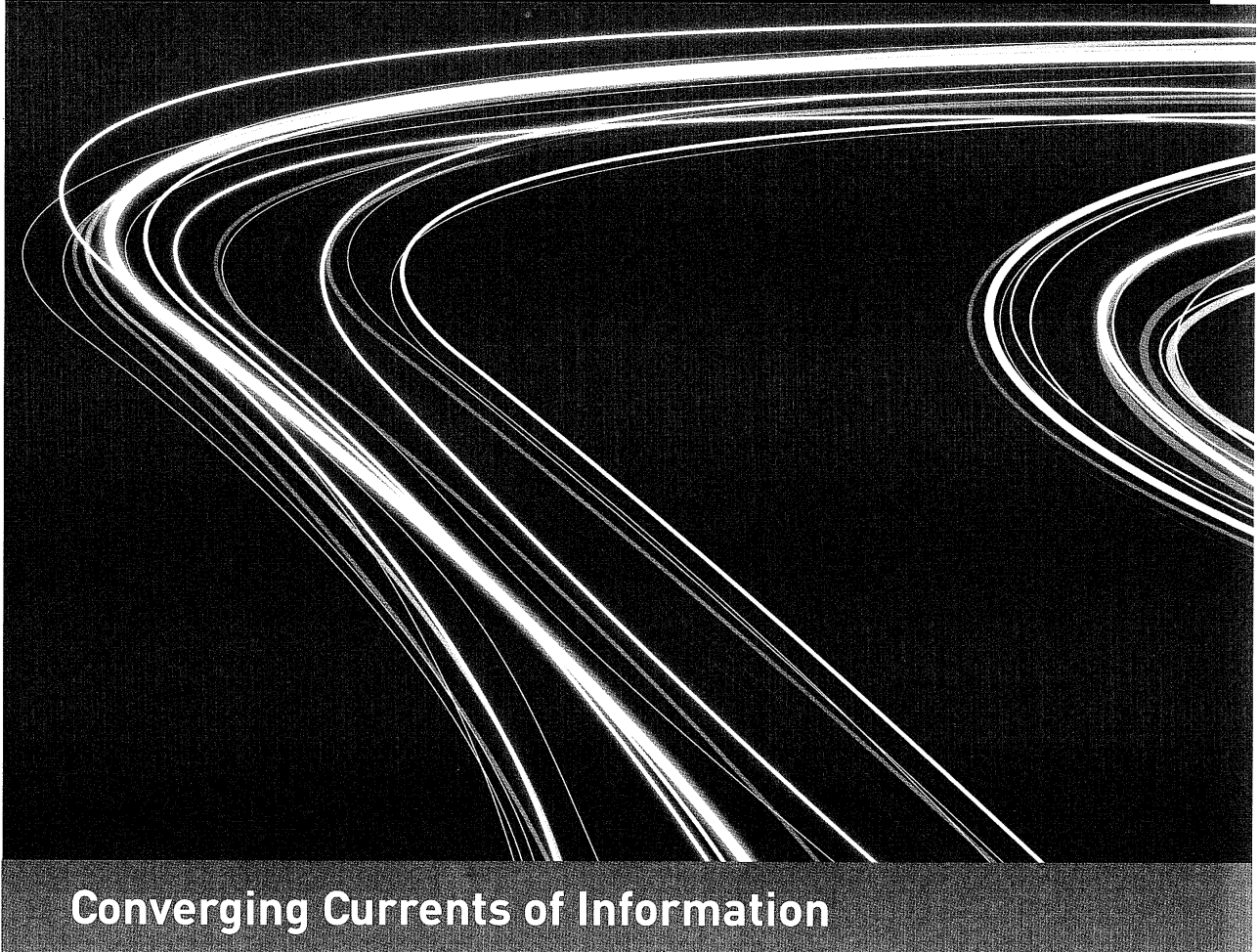
Converging Currents of Information

Improve productivity, increase business intelligence and realize benefits throughout your organization.

Organizations in all industries are seeking to integrate the flow of information into their business, combining transactional data and document management to enable better decision making, promote collaboration and simplify complex work processes.

Run Smarter®

Laserfiche

Power your business processes with your information

With the universal information support of Laserfiche 8™ at the core of your document management infrastructure, you benefit from a comprehensive information management system that integrates both electronic and paper documents, as well as legacy information and information from mission-critical applications, into enterprise-wide business processes.

Learn More Inside:

▶ Manage information assets throughout their life cycle.

▶ Align IT investments with your enterprise information strategy.

▶ Accelerate shared business processes.

▶ Capture, manage and archive information in any format.

▶ Maximize efficiency, productivity and profitability.

▶ Enhance enterprise-wide collaboration.

Universal Information Support, Enterprise-Wide

An integrated strategy to deliver critical business information on-demand enhances efficiency and enables a rapid response to changing conditions. With the Laserfiche 8 system, you drive innovation, improving service levels while lowering IT costs.

From business owners and records managers to users and IT personnel, you can:

▸ **Eliminate inefficient work processes.**

▸ **Remove obstacles to sharing information.**

▸ **Empower your staff to use their time more efficiently.**

▸ **Manage and protect organizational archives reliably and securely.**

Business Owners and Managers

Making sure your organization operates at peak efficiency can often be a complicated undertaking. Laserfiche 8™ is a unified solution designed to address complex business requirements, based on over twenty years of experience working with organizations to solve their most complicated problems.

With Laserfiche 8, you can integrate legacy systems, third party databases and information from critical business applications with paper and electronic documents. When you consider the lower overhead resulting from centrally managing your organizational archives, the return on investment and long-term savings are clear.

Stop your staff members from wasting time searching for information instead of putting it to use, and enable them to proactively identify opportunities, instead of watching them pass by. With instant search and retrieval, any information you need is right on your desktop. In addition, you simplify and reduce the costs of regulatory compliance with a flexible platform that accommodates a variety of record-keeping regulations. And with CD/DVD backups, you simplify your business continuity planning strategy as well.

Provide superior operational agility in even the most complicated environments. Laserfiche 8 is up to the task—which means you are, too.

IT Personnel

It is crucial that a document management solution not create problems for IT, even as it solves them for users. The Laserfiche 8 system provides the complete solution you need to manage your enterprise document management infrastructure, without increasing IT budgets, support requirements or workload.

The Laserfiche 8 product suite is easily deployed, easily managed, easily customized and easily integrated, with support for both Microsoft® and Oracle® database platforms. Quick deployment means that your solution is up and running in days instead of months. Scalability means that your solution can grow as your organization does—Laserfiche® easily accommodates both an increasing number of users and high-volume repository growth.

With open architecture, the tools you need to speed system integration and support for custom application development, Laserfiche® fits smoothly into your existing networked environment without a major investment of programming time.

With the addition of Laserfiche to your enterprise information management infrastructure, you provide a complete document management solution while reliably managing your processes and guaranteeing security, without increasing IT workload.

Records Managers

Integrating records management into your daily routine is often more complicated than you'd like it to be. How do you encourage proper, standardized, consistent filing procedures without creating more work for both you and your staff?

With the Records Management Edition™, you have the peace of mind of a DoD 5015.2-certified solution and the ease of a fully-integrated records management and document management system. Transparent records management tools mean that records management no longer interferes with your line-of-business. Take advantage of total life cycle management—run reports detailing where records are in their life cycle and which records are eligible for transfer, accession or destruction. Additionally, all system activity is logged, providing an audit trail that can be used to prove adherence to the records management plan and adherence to compliance regulations.

Take advantage of all the tools you need to design and implement a file plan for the management of all imaged, electronic and physical records. With the strength of the Laserfiche 8 Records Management Edition, your records program becomes a strategic asset to your organization.

Users

Your staff may have the skills, but do they have the tools that deliver information, simplify their repetitive tasks and help them rise beyond daily demands to greater heights of productivity and efficiency?

With Laserfiche 8, they do. Following familiar Microsoft Windows® conventions, Laserfiche adapts to existing procedures rather than requiring extensive training, meaning that new users get up to speed quickly.

With Laserfiche's Intelligent Search functionality, full-text, index and other precision searches reduce time lost on hardcopy file retrieval. Digital files make it simple for your staff to share information and work more effectively together. And with Workflow functionality, you can simplify business processes to help your staff spend time on productive activities, instead of labor-intensive document handling processes.

Give your staff the tools they need to make a strategic impact on your organization. With the Laserfiche 8 system, you enable your staff to use their skills strategically and intelligently.

Laserfiche 8
INTEGRATION
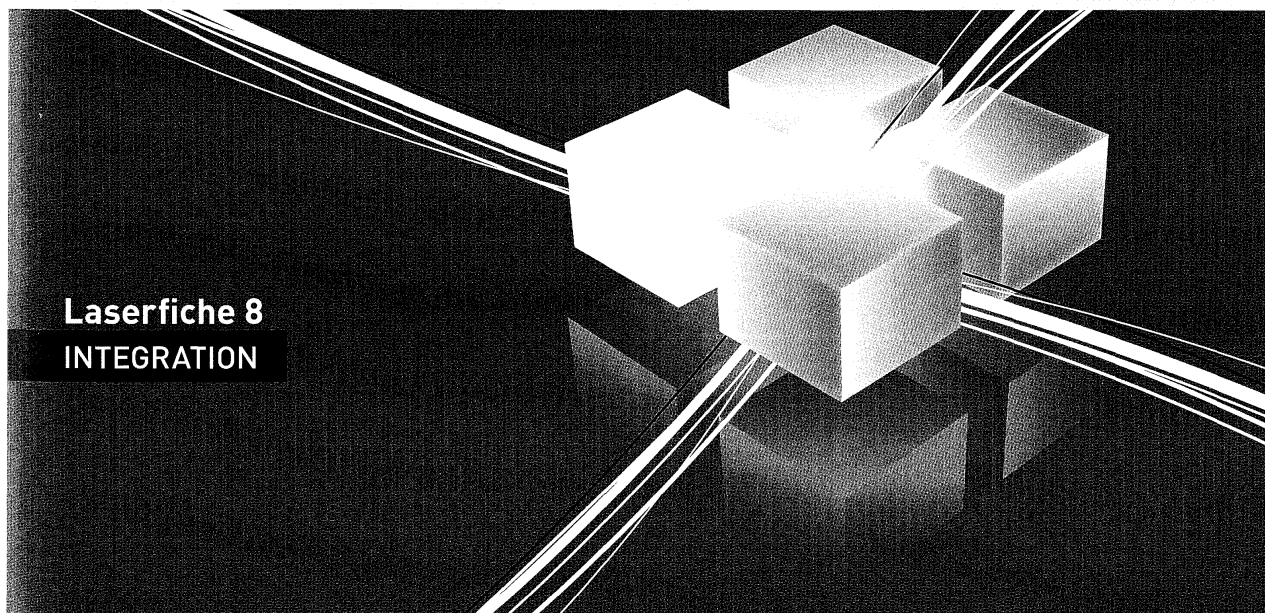
One Product, Countless Solutions

In a competitive environment, **high performance isn't just a goal—it's an imperative.** You need innovative, usable tools that help you simplify daily tasks so that your organization can rise above the competition.

Your current business processes have made you successful, but sometimes it's difficult to look beyond your current work processes to determine how you can reach the next level of success. The flexibility of the **Laserfiche 8 platform's modular set of solutions enables you to create exactly the system to solve your organization's most critical problems.** The Laserfiche product suite is designed for interoperability, ensuring your needs are met without compromising efficiency, security or technical workability.

With Laserfiche 8, you work the way you always have—but better. **With powerful functionality that improves the efficiency of your existing processes,** you get the all the benefits of increased productivity without the burden of learning a new way to work.

Capturing and Managing All Your Information

To enhance business operations, your digital document management solution must accommodate all types of content, regardless of format. Laserfiche 8 archives scanned images, electronic documents, e-mail messages, and digital audio and video files, all from a single, easy-to-use interface. Quick Fields™ batch processing technology speeds production-level document processing, with modules for forms processing and specialized capture hardware that meet all your organization's document capture needs.

Bring files into your Laserfiche repository by scanning paper documents, importing electronic documents, or converting electronic documents into unalterable images. With its trademark flexibility, Laserfiche supports both distributed and centralized capture models and enables your organization to work with whatever capture methods fit your needs best, fully integrating your document management infrastructure into your organizational work processes.

Laserfiche 8 Solutions: Quick Fields™, Import Agent™, Snapshot 8™

Integrating Information with Automated Business Processes

Using the Laserfiche 8 platform, you integrate both electronic and paper documents into the flow of your enterprise-wide business processes, facilitating collaboration and information sharing for enhanced productivity and business process automation.

Automate workflow, eliminating bottlenecks and streamlining business processes, with Workflow 8™. With Workflow, documents are automatically moved, copied or deleted based on predetermined rules you design, while automatic notifications ensure prompt action and simplify supervision. Combine the extensive security features of Workflow with the comprehensive security reporting of Audit Trail 8™, and you have the information you need to accurately assess your business processes to identify bottlenecks, maintain performance comparisons and track document-related activity to improve quality, accountability and productivity.

You may be seeking to automate the often complex process of preparing a formal agenda, which often rivals the importance of the document itself. With our Web-based agenda management tools, you automatically route proposed items through the approval process, simplifying every aspect of the agenda creation process.

Ensure faster, smarter agenda management by eliminating repetitive tasks and streamlining everything from item submission and approval processes to agenda assembly and distribution.

Laserfiche 8's business process solutions are designed for quick installation and deployment. With Laserfiche 8 at the core of your organization's document management infrastructure, supporting efficient business processes becomes simple, regardless of your organization's needs or industry.

Laserfiche 8 Solutions: Workflow 8™, Agenda Manager™, Agenda Processor™, Audit Trail 8™

Laserfiche 8
WORKFLOW
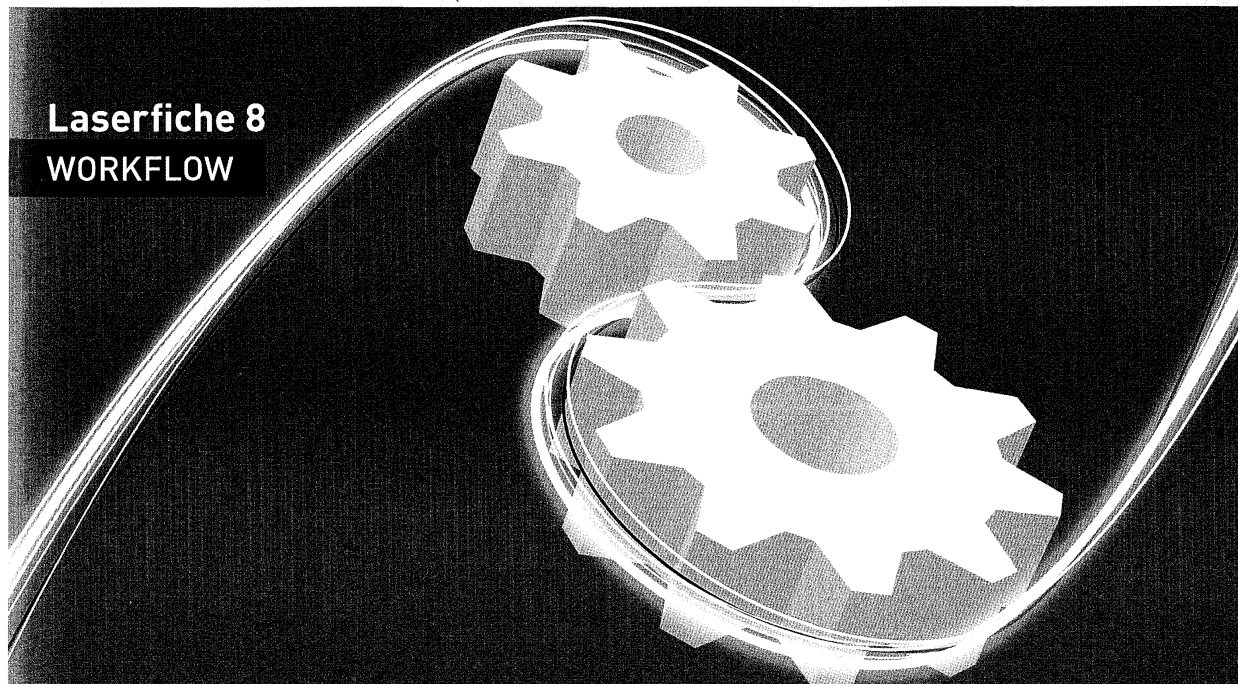
One Product, Countless Solutions

Unifying Records Management with Your Document Management Platform

It's not easy being a records manager these days. With a rapidly-changing regulatory environment, organizations are looking to records management solutions to manage information and ensure compliance with regulatory demands, yet with rapid changes in the technology sector, it's hard to predict what applications and hardware will be current five or ten years from now. However, the need for improved records management means that you can't wait to implement a solution.

A digital records solution reduces costs, improves accountability and enhances security. Tight integration with document imaging and information management tools extends those benefits into other business processes organization-wide. The Department of Defense (DoD) 5015.2-certified Records Management Edition provides integrated records management tools that make it simple to manage both documents and records from one platform, without interfering with your line-of-business. And storage in the non-proprietary TIFF file format assures records managers that archived information will be readable in the future, regardless of technological changes.

The Laserfiche 8 system provides the fully-integrated records management tools you need to simply and reliably manage your information assets. With all your information stored in one central, secure repository, your documents never need to leave—providing you the security you need and the ease-of-use you're looking for. Leverage the full force of a proven records management platform combined with modular capture, distribution and workflow tools to provide both complete life cycle management and mission-critical records functionality.

Laserfiche 8 Solutions: Records Management Edition™

Accelerating Shared Business Processes

With your current procedures, information sharing is difficult and limits how effectively your staff can work. Electronic documents are often stored on local hard drives, which makes access complicated. Sharing paper documents usually entails photocopying and sharing microfilm requires conversion to paper. Retrieving information stored in legacy systems is often complicated or costly. Digital documents, however, can be viewed by multiple employees simultaneously, whether they are working in different departments or different countries.

Laserfiche 8 offers a variety of options to assist you in getting information to the people who need it most, whether it's over the Web, through your organization's intranet, on CD or DVD, or by e-mail. With Laserfiche, you can publish your documents to CD or DVD, which include built-in viewers and search capabilities so documents can be viewed and searched on any PC. With easy-to-use Web publishing, you can publish documents to the Web at the touch of a button, balancing access with security and presenting a consistent face to customers and the public with a customizable Web interface that matches your main Website.

Laserfiche's innovative solutions improve productivity, encourage information sharing and enable more effective communication. Make it simple for your staff to share information with each other and with outside professionals, clients or regulators—and reap the benefits of an informed workforce.

Laserfiche 8 Solutions: WebLink™, Web Access 8™, Plus™, E-mail Plug-in™

Balancing Access and Security

Security is no longer simply a matter of creating an impenetrable system that no one can break into. While that deals with threats from outside your organization, it doesn't manage misuse from within. You need to create boundaries and track when someone tries to step outside of their boundary. And with the security controls of the Laserfiche system, combined with the tracking and reporting capabilities of Audit Trail 8, you have the tools you need to both create and enforce boundaries for everyone within your organization.

System security is an absolute necessity for any document management system. A rigorous security system should permit every authorized person to perform required duties—whether from desktop, laptop, the office, a remote location or over the Web—without compromising the integrity of the database, system or network. While security is crucial, it can't be so restrictive that it limits users' ability to perform required tasks.

Laserfiche's comprehensive security controls give your system administrator the tools they need to balance access and security with control over both access rights and feature rights, as well as redaction tools to protect confidential information within files. Safeguard information with security measures that extend from folders and files, right down to individual words, and prevent unauthorized access with access controls and audit trails that provide round-the-clock vigilance over user actions.

**Laserfiche 8 Solutions: Laserfiche United™,
Laserfiche Team™, Records Management Edition,
Audit Trail 8**

Ensuring Compliance with Regulations

Increasingly-strict regulations continue to drive up record storage costs and impose time-sensitive retrieval burdens. Laserfiche 8 provides the tools you need to comply with the crucial regulations that impact your business while simultaneously reducing compliance costs. Ensure proper records retention with a flexible technology platform that accommodates SEC, FINRA, Sarbanes-Oxley, HIPAA and other rules. Comprehensive security controls leave you in control, no matter how demanding your regulatory environment.

Laserfiche also gives you the tools you need to simplify disaster recovery and business continuity planning. In the case of natural disaster, network outage or other event beyond your control, CD and DVD backups allow you to quickly reconstruct your archives. Built-in viewers and search capabilities allow immediate document access from any PC with a CD or DVD drive, even if the network remains offline for an extended period—allowing you to shorten recovery time, provide fast information access and get back to business.

To be truly valuable as a compliance tool, technology must be flexible and secure enough to support the complex record-keeping procedures required in a multi-regulatory environment. The Laserfiche 8 system gives you the technology you need to support compliance throughout your organization.

**Laserfiche 8 Solutions: Records Management
Edition, Plus, Audit Trail 8**

One Product, Countless Solutions

Integrating Document Management With Your Enterprise Infrastructure

To truly maximize the value of your Laserfiche system, it must be a seamless extension of your existing enterprise applications. Integration with business-critical applications is the key to enabling streamlined and collaborative processes to access information enterprise-wide.

Laserfiche 8's packaged integration tools make it simple to facilitate image enabling and back-end integrations, while minimizing the burden on your IT staff. Quickly and cost-effectively develop custom imaging applications tailored to your business needs with the Integrator's Toolkit™, which provides all the necessary commands and documentation—

including sample code—to integrate Laserfiche with third-party applications, customize system functionality and automate Laserfiche-related tasks. The Laserfiche Code Library™ provides a central location for the Laserfiche community—Laserfiche staff, users and technical experts—to share sample applications and supplemental information that help users create their own Toolkit applications and other customized content.

With Laserfiche 8, you have the tools you need to make sure your system fits seamlessly into both your existing IT infrastructure and your way of doing business.

Laserfiche 8 Solutions: Integrator's Toolkit™, Code Library™

The Laserfiche 8 Platform: Powerful Functionality to Fit Your Needs

- ☑ Flexible, customizable storage solutions
- ☑ Comprehensive search functionality
- ☑ Easy-to-manage metadata
- ☑ Enhanced annotation features
- ☑ Rapidly deployable browser-based solutions
- ☑ Tight integration with Microsoft® Office® applications
- ☑ Automated scanning and importing
- ☑ Powerful workflow functionality
- ☑ Superior security features
- ☑ Universal information support
- ☑ Uniform access to data

Enhanced Capabilities To Bring You Greater Efficiency

For over twenty years, **Laserfiche solutions have helped organizations worldwide increase productivity** by streamlining tedious work processes and enabling more efficient information sharing. The modular, flexible tools of the Laserfiche system are developed to work together, reducing administrative overhead and training costs and accelerating user adoption with a familiar interface and the **flexibility to fit the way you work**.

The Laserfiche 8 environment was developed strategically to enhance processes enterprise-wide, but can be deployed tactically, enabling customized, scalable solutions that work with pilot programs, specific departmental needs or budgetary restrictions. You may start small, but once you realize the benefits of information integration, you can **easily expand your document management infrastructure to multiple departments or locations** with both desktop and Web-based solutions.

Benefit from the enterprise-quality document management platform that fits your unique needs. Laserfiche 8 is the flexible, powerful solution that will take your organization to the next level.

Flexible Storage to Fit Your Organization

▸ Duplicate your existing filing system with an easily-learned, hierarchical filing structure made up of nested directories.

▸ Copy folders from one directory to another, speeding the duplication of commonly-used filing structures.

▸ Benefit from page-on-demand technology that stores scanned image files as single-page TIFFs—downloading only the pages actually viewed, rather than entire documents —to conserve network resources.

▸ Maintain specific control over the storage location of images and other large content files.

▸ Limit storage monitoring and archival maintenance with flexible, dynamic volumes that are automatically generated based on size limits you specify.

▸ Allow users to restore their own accidentally deleted documents or folders from a Recycle Bin™ before scheduled permanent deletion from storage.

Highly-Scalable Browser-Based Solutions for Access and Distribution

▸ Rapidly deploy a browser-based thin client solution across your entire organization.

▸ Enable online access to your document repository for employees, clients or constituents, without complicated programming.

▸ Benefit from enhanced viewing capabilities with a faster zoom speed and improved panning tools.

Comprehensive Search Functionality

▶ Make searching more fluid and automatic with fully-integrated text extraction from all documents in your repository—such as imaged documents, electronic documents including Adobe® PDF and Microsoft Office® documents, and other binary files.

▶ Benefit from a multitude of powerful search methodologies, including full-text, metadata, annotation or folder/file tree search.

▶ Use bolded lines of context to find exactly the information you're looking for, without searching through pages of a single document or opening multiple documents.

▶ Search through spelling variations or misread OCR text with "fuzzy logic" tools.

▶ Save and load common searches.

▶ Copy text, pages or even entire documents from the Search Results pane.

▶ Speed searching through the repository with a "quick search" button from your toolbar.

Enhanced Annotation Features

▶ Add drawings, handwritten notes or signatures to your documents with freehand pencil annotation tools.

▶ Apply full-color images to documents with image annotations.

▶ Use textbox and sticky note annotations to add text to scanned images.

▶ Link electronic documents to information on the scanned image with attachment annotations.

▶ Store personal stamps on the server, enabling access for users even if they are logging in from a different client or over the Web.

▶ Utilize sticky note history to view past revisions, track time and date of previous modifications and review previous modifiers.

▶ Flag individual annotations as "protected," preventing modification or deletion by anyone but the user who created the annotation.

▶ Secure information with private annotations, which are only visible to the person who created them.

▶ Rely on blackout and whiteout redactions to protect secure information from unauthorized viewers, encrypting both the image and associated text.

Enhanced Capabilities To Bring You Greater Efficiency

Tight Integration with Microsoft Office Applications

▸ File electronic documents directly from Microsoft Office applications with a "Send to Laserfiche" feature.

▸ Save and open documents in your Laserfiche repository from Microsoft Office applications.

▸ Browse your Laserfiche repository from Windows Explorer, saving or opening files exactly like on your desktop.

▸ Send e-mails directly to the Laserfiche repository from Microsoft Outlook®.

▸ Auto-populate metadata for imported Microsoft Outlook e-mails.

▸ Archive electronic documents as TIFF images directly from Microsoft and other third-party applications with the Snapshot 8™ plug-in.

▸ Add shortcuts to launch popular Microsoft applications directly from the Laserfiche Client™ interface.

Automated Scanning and Importing with Quick Fields and Import Agent

▸ Increase the volume and accuracy of forms-processing operations.

▸ Scan and import both paper and electronic documents during off-peak hours with automation and scheduling features.

▸ Instantly verify that forms have been signed using Optical Mark Recognition (OMR).

▸ Improve the integrity of newly-captured information by matching it against data from CRM and other software applications for instant validation and data sharing.

▸ Process documents quickly by automatically extracting data from bar codes, checks and customizable areas of forms and documents.

▸ Capture text from relevant boxes on invoices, tax forms and slip sheets.

▸ Use form data to create document names, populate template fields and determine where documents will be stored in the repository.

Easy-to-Manage Metadata

▸ Assign a single field definition to multiple templates.

▸ Apply individual fields specifically to a document, regardless of template.

▸ Use new field types—binary, time and number, which supports both fixed integer and decimal values—to index your information more accurately.

▸ Store multiple values in a single field and search on any value independently with multi-value fields.

▸ Make categorization easy with customizable drop-down menus.

▸ Secure templates—both the definitions and the values assigned to entries—to eliminate tampering.

Powerful Workflow Functionality

▸ Design simple or complex workflow routing rules on a graphical canvas, choosing from a broad palette of workflow actions.

▸ Maintain integrity of documents routed by Workflow, given that they never leave the repository.

▸ Assign field values or annotations and change security access to repository documents from a workflow.

▸ Specify search criteria for locating a repository document that should be processed by a workflow.

▸ Specify routing to groups, task and notification escalation, serial or parallel routing, and conditional loops.

▸ Use Windows Workflow Foundation™ activities to extend Workflow functionality to all line-of-business applications.

▸ Benefit from the Laserfiche community's shared workflow rules and custom actions, available for download from the Code Library.

Superior Security Features

▸ Assign access directly to Windows groups, defining rights by user, group or both.

▸ Specify depth of access in the file tree—for example, to a general folder, but not to its subfolders.

▸ Secure repository content by folder or volume and restrict access to metadata or annotations.

▸ Define and restrict access to records with security tags.

▸ Audit all interactions with the document repository or specify events to be recorded per group or user.

▸ Require users to submit reasons for printing, e-mailing and exporting documents, as well as enforce the application of watermarks to authenticate printed documents, with comprehensive Audit Trail functionality.

▸ Randomly generate passwords for newly created accounts or lockout user accounts from login after a specified number of failed attempts or a period of inactivity.

Laserfiche 8
SECURITY
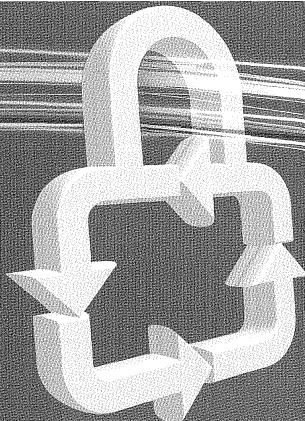
Laserfiche Product Suite

A modular set of tools to design a custom solution that fits the way your organization works.

Laserfiche 8™ Document Management System
Organize, protect and retrieve information with our core products.

Laserfiche Team™
Digital document management solution for work groups, departments and small businesses.

Laserfiche United™
Enterprise-level digital document management solution.

Laserfiche Records Management Edition™
Fully integrated DoD 5015.2-certified records management and document management solution.

Laserfiche Web Access 8™
A Web browser-based, true thin client for secure, wide-scale document management deployment.

Document and Information Capture
Bring paper and electronic documents into your digital system quickly and easily.

Laserfiche Quick Fields™
Forms processing, specialized capture hardware and other document capture modules for production-level document processing.

Laserfiche Import Agent™
Automatic capture for documents generated by copier-scanner hybrids, fax servers and other multi-function peripherals.

Laserfiche Snapshot 8™
Creation of archival images of electronic documents without repetitive printing and scanning.

Document Distribution
Provide secure, efficient document access to users across the office and around the world.

Laserfiche WebLink™
Secure, platform-independent Web publishing that integrates easily with your existing Website.

Laserfiche Plus™
Distribute and archive documents on royalty-free CDs or DVDs with built-in search engines.

Laserfiche E-mail Plug-in™
Use standard e-mail applications to share archived documents.

Business Process Management

Streamline document-centered processes and track activity for regulatory compliance.

Laserfiche Workflow 8™

Rules-based document routing, e-mail notification and activity monitoring to ensure constant productivity.

Laserfiche Agenda Manager™ and Agenda Processor™

Tools to simplify and speed agenda creation, approval and distribution processes.

Laserfiche Audit Trail 8™

Three levels of audit reporting to address your specific regulatory compliance and security needs.

Integration and Customization

Integrate Laserfiche with third-party applications, customize system functionality and automate Laserfiche-related tasks.

Laserfiche Integrator's Toolkit™

Sample code and complete documentation to enable custom integration with other mission-critical systems.

Laserfiche Code Library™

Sample applications and supplemental information to create custom applications and other content, provided by the Laserfiche community.

Laserfiche Marketplace™

Customized modules, including integrations, configurations, plug-ins and Web tools, provided by Laserfiche Professional Developer Partners™.

Software Assurance

Manage change and protect your investment.

Laserfiche Software Assurance Plan (LSAP™) Includes:

▶ New releases, product updates and technical support from your reseller.

▶ 100% credit toward product upgrades.

▶ Access to the Knowledge Base, discussion forum and other educational resources.

LSAP members receive the most current versions of licensed Laserfiche products.

As part of their annual membership, Premium LSAP members receive telephone support through their reseller, with a guaranteed response time of four business hours. Premium LSAP members also benefit from direct-to-Laserfiche Web chat for designated support personnel, fast-track escalation and preferred pricing on user education programs.

About Laserfiche Solutions

Laserfiche creates simple and elegant document management solutions that help organizations run smarter. Since 1987, more than 25,000 organizations–including government offices, Fortune 1000 companies, healthcare organizations and financial services firms–have used Laserfiche software to streamline processes for managing documents, records and workflow. By digitizing paper archives, Laserfiche enables users to instantly pinpoint the information they need, to collaborate more effectively and to complete daily tasks more efficiently. Secure Web access allows organizations to share information with remote offices, business partners and clients, while user- and role-based security options ensure compliance with government- and industry-mandated standards, including Department of Defense (DoD) standard 5015.2.

Your Next Step

Call (800) 985-8533 to arrange a demonstration. E-mail **info@laserfiche.com** or visit **www.laserfiche.com** to request your free Laserfiche demo CD.

3545 Long Beach Blvd.
Long Beach, CA 90807
USA

Tel: (562) 988-1688
Toll Free: (800) 985-8533
Fax: (562) 988-1886

Web: www.laserfiche.com
E-mail: info@laserfiche.com