

# Scope of Services

## Scope of Work

### Scope Description

The scope of this project consists of the set-up and design of Laserfiche Avante Full SQL Server including workflow on premises. The set-up will include 15 named full users including thin client, Email, Snapshot and Form Essentials, Starter Public Portal with 10 concurrent retrieval views, Laserfiche Connector, Project Management, Installation and Setup, Taxonomy and Design, Training: Admin Level I, End User Training, Questys Data Conversion. Set up services includes configuration of the Laserfiche software, consultation and configuration of the repository structure and design based on the Customer's retention policies, and the conversion of the existing Questys database. Multiple end user training classes will be included as well as separate trainings for Admin, Workflows and Forms, as well as Quick Fields.

### Scope Definition

The following scope of the project includes:

#### **Project Management – 4 Days**

##### **Initial Project Planning**

- Review of project requirements, project plan creation, timeline development, and resource allocation

##### **Project Management**

- Professional project management services from Complete Paperless Solutions
  - ❖ Project plan development
  - ❖ Kick off meeting
  - ❖ Project status meetings
  - ❖ Project status updates
- Documentation
  - ❖ Solution documentation
  - ❖ Training documentation

#### **Training – 8 Days**

- Laserfiche server, client, import and scanning, and business process components
- Import and Capture Training
  - ❖ Laserfiche Scanning
  - ❖ Import Agent
- Search and Retrieval Training
  - ❖ Laserfiche thin and thick Client
- Laserfiche Administrator Training
  - ❖ Security
  - ❖ User configuration
  - ❖ Volume configuration
  - ❖ IT
- Laserfiche Workflow and Forms Training
  - ❖ Workflow Designer

- ❖ Forms Designer
- Laserfiche Quick Fields Training
  - ❖ Creation and design of Quick Fields sessions

**Installation, Repository Design and Configuration – 3 Days**

- Retention Policies
- Folder Structure
- Naming Convention (Taxonomy)
- Template and Field Design
- User License Allocation and Security
- Storage Volumes
- Public Portal Design

**Conversion – Questys**

- Data
- No retention
- No annotations

**Project Contingency**

Additional project time to account for unforeseen tasks or time necessary to complete in scope requirements. No specific forms or workflows have been included in this Scope of Work and would need to be purchased separately.