RESOLUTION No. _11 - 2026_

A RESOLUTION OF THE TOWN COMMISSION OF THE TOWN OF SURFSIDE, FLORIDA, AUTHORIZING THE TOWN TO ENTER INTO AN AGREEMENT WITH MUNICIPAL CODE CORPORATION LLC., OF FLORIDA AND THE TOWN OF SURFSIDE PIGGYBACKING OFF THE COMPETIVELY BID CONTRACT AWARDED BY THE STATE OF TEXAS; AUTHORIZING THE TOWN MANAGER AND TOWN ATTORNEY TO DO ALL THINGS NECESSARY TO IMPLEMENT THE TERMS OF THE CONTRACT; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Town of Surfside has a need for proper care and preservation of public records and documents for compliance with Florida law; and

WHEREAS, the Town Commission has recognized the need to begin a document imaging and records management program by piggybacking off a competitively bid contract by the State of Texas with Municipal Code Corporation, LLC. of Florida (hereinafter MCCi); and

WHEREAS, the Town Commission of the Town of Surfside, Florida wishes to enter into an Agreement with MCCi by piggybacking off the competitively bid contract awarded by the State of Texas for Laserfiche software, services, and equipment;

NOW, THEREFORE, BE IT RESOLVED BY THE TOWN COMMISSION OF THE TOWN OF SURFSIDE, FLORIDA AS FOLLOWS:

Section 1. **Recitals.** That the above and foregoing recitals are true and correct and are incorporated herein by reference.

Section 2. **Authorization to enter into an agreement.** The Town Commission hereby authorizes the Town Manager to enter into the Agreement by and between MCCi and the Town of Surfside attached as Exhibit "A."

Section 3. **Implementation.** The Town Manager and the Town Attorney are hereby authorized to take any and all action necessary to implement this Resolution and Agreement in accordance with the terms, conditions and purposes of this Resolution and Agreement.
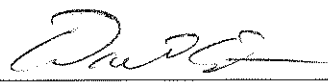
Section 4. **Effective Date.** This Resolution shall become effective immediately upon its adoption.

PASSED AND ADOPTED this _14_ day of _June_, 2011.

Motion by Commissioner _Kopelman_, second by Commissioner _Karukin_.

FINAL VOTE ON ADOPTION

Commissioner Michael Karukin	yes
Commissioner Edward Kopelman	yes
Commissioner Marta Olchyk	yes
Vice Mayor Joseph Graubart	yes
Mayor Daniel Dietch	yes

_____
Daniel Dietch, Mayor

Resolution No. _11-2026_

ATTEST:

Debra E. Eastman

Debra E. Eastman, MMC
Town Clerk

APPROVED AS TO FORM AND
LEGAL SUFFICIENCY FOR
THE TOWN OF SURFSIDE ONLY:

Lynn M. Dannheisser

Lynn M. Dannheisser
Town Attorney

MCCi

ExperienceExcellence

Municipal Code Corporation
SALES DEPARTMENT
PO Box 2235 ⚫ Tallahassee, Florida 32316
TELEPHONE (800) 342-2633 ⚫ FAX (850) 701-0715
Logan Di Liello, Account Executive ⚫ extension 725 ⚫ logan@mccinnovations.com

March 31, 2011

Debra Eastman
Town Clerk
9293 Harding Avenue
Surfside, Florida 33154

Dear Ms. Eastman:

I enjoyed speaking with you recently regarding the Laserfiche software. Pursuant to our discussion we are pleased to enclose our Professional Services Proposal. While reviewing the proposal please keep in mind the following advantages of being a customer of MCCi:

➢ **MCCi is the #1 ranked Laserfiche VAR** – For the past three years, MCCi was ranked as the #1 Laserfiche VAR in the United States.

➢ **MCCi employees have superior credentials** – MCCi's staff is well-trained and holds multiple certifications in security, HIPPA, Laserfiche certifications and CDIA+ to give you the peace of mind that we are simply the best at what we do.

➢ **MCCi focuses on local governments-** MCCi was created by Municipal Code Corporation to focus on innovative technologies for Local Government. MCCi provides Laserfiche software and services to more than 400 cities and counties.

➢ **MCCi offers superior project management services-** MCCi utilizes a multi-layered support team geared towards offering each client multiple contacts to enhance the usage of every product implemented. In addition, all MCCi technicians have advanced professional certifications and are committed to ethical, effective and friendly support.

➢ **MCCi offers superior support-** MCCi offers support through our help desk, email, and toll free number, and we also have a phenomenal online support center that gives end users access to training manuals, "how to" checklists, training videos, a knowledge base, and software updates.

TX DIR STATE CONTRACT # **DIR-SDD-980:** MCCi has an active state contract with the State of Texas. The state of Texas allows governmental entities outside of the state of Texas to utilize the contract. The following statement of work is based on the MCCi's price schedule from our DIR contract. A copy of the contract can be found by visiting http://www2.dir.state.tx.us/ict/contracts/Pages/ProductsServices.aspx, and searching by MCCi's contract number: "DIR-SDD-980".

If you have any questions concerning our proposal or desire additional information, please do not hesitate to contact me on our toll-free number. We appreciate your interest and hope that we will have the pleasure of working with you and serving the Town of Surfside, FL.

Sincerely,

Logan Di Liello
Account Executive

Executive Summary

Laserfiche has been a resource for over 21,000 organizations since 1987. Laserfiche creates elegant document management solutions that help organizations run smarter. Dedication to customer-driven innovations has built a suite of products and services that address organization-wide business problems from executive, records management, and information technology and end-user perspectives.

Laserfiche is a unified solution that manages all your organization's documents and records, regardless of location or media. Laserfiche strikes a balance between security and accessibility, protecting information while providing efficient access to keep staff working at maximum productivity. Please keep in mind the following competitive advantages of Laserfiche:

- Digital Archiving- Digital archiving is the storage of paper and electronic documents in accessible electronic media with long-term preservation capability. It is cost effective because it saves physical storage space and it cuts media maintenance costs. Original documents can be stored off-site or destroyed as necessary. This simplifies the disaster recovery process by allowing you to backup documents on digital media and stores them off-site.
- Business Process Automation – Laserfiche's Workflow functionality utilizes the Microsoft Windows Workflow Foundation and allows for automating approval processes, document routing, providing additional integration options, and much more.
- Records Management – Laserfiche's Records Management Edition meets the Department of Defense (DoD) standards, and augments traditional ECM functionality by adding Records Management tools to manage retention, disposition, vital records, and much more.
- Comprehensive Security- Laserfiche Comprehensive Security allows you to control the security of your documents on many levels. You determine what functions, such as scanning and printing, each staff member may use. Security features are easy to administer, records managers can administer most security functions without IT staff assistance.
- User Friendly- Laserfiche is very easy to learn and use. It has a folder tree structure similar to Windows Explorer to make it easy to use. Your office can begin to scan and retrieve documents almost immediately after installation.
- Intelligent Search- Laserfiche lets you search your documents based upon full-text search, index search, and document and folder name searches. The Laserfiche full-text search unlocks the contents of your documents; if you need to find a word or phrase within a document, the full-text search retrieves it immediately. There is not any other imaging software that allows you this many searching possibilities.
- Web Access- Laserfiche allows you to publish your documents on the web with our WebLink software. You decide which documents you wanted published and WebLink publishes them on the web without having to use HTML programming. Users can then search the site to find the information they need using the Intelligent Search feature.
- Integration- Laserfiche is able to integrate with current software and hardware on existing systems.
- Service- Laserfiche understands the importance of a thorough support service. From technical help to the latest document imaging news, Laserfiche is dedicated to forming a lasting, complete service relationship. Should you need technical assistance; a qualified professional will be available to help you.

ECM SOFTWARE LICENSING	Qty	Cost	DIR-SDD-980	Total
☑ Avante Server for SQL Express	1	$1,500.00	$1,410.00	$1,410.00
☑ LF Full Named User *Includes Snapshot, Email, and Workflow*	5	$500.00	$470.00	$2,350.00
☑ LF Starter Audit Trail, 10% Add On to All Named Users	5	$50.00	$47.00	$235.00
☑ LF Scanconnect *required for each scanner purchased/utilized*	2	$165.00	$155.10	$310.20
☑ LF Workflow		Included	Included	Included
Document Management Software and Licenses Total				**$4,305.20**

ANNUAL SOFTWARE SUPPORT - BASIC LSAP				
☑ Avante Server for SQL Express	1	$300.00	$270.00	$270.00
☑ LF Full Named User *Includes Snapshot, Email, and Workflow*	5	$100.00	$90.00	$450.00
☑ LF Starter Audit Trail, 10% Add On to All Named Users	5	$10.00	$9.00	$45.00
☑ LF Scanconnect *required for each scanner purchased/utilized*	2	$34.00	$30.60	$61.20
☑ LF Workflow		Included	Included	Included
☑ First Year Managed Services	1	$562.50	$562.50	$562.50
☑ Service Level Agreement				$165.24
Annual Support Total				**$1,553.94**

For budgetary purposes, the Client should include $1553.94 in annual budget for renewal of LSAP, SLA and Managed Services of the above quoted software.

MCCi PROFESSIONAL SERVICES				
☑ Onsite Installation & Training of software, per day *Travel expenses included.*	1.5	$2,100.00	$1,932.00	$2,898.00
☑ MCCi Project Management Services		N/A	N/A	$1,600.00
☑ Shipping and Handling Fee for Laserfiche Software				$50.00

| **Total Project Cost** | | | | **$10,407.14** |

PAYMENT & BILLING TERMS
MCCi will invoice fifty percent (50%) of the total contract amount upon receipt of the signed contract. Balance of total project will be invoiced and billed upon completion of the proposed installation and training services. Sales Tax will be included where applicable. Payment will be due upon receipt of an invoice.

To determine which services and products are included with your project, please refer to the Statement of Work above.

MCCi prides itself in providing high quality professional services and support. Providing the most advanced level of tech support via the web, e-mail and phone, you can rest assured that MCCi will provide you with profession installation, training and support services. Our clients can rely on us to provide a continual flow of information through our technical bulletins and newsletters.

MCCi PROJECT MANAGEMENT SERVICES

MCCi Project Management services include CDIA-certified MCCi professionals. The CDIA (Certified Document Imaging Architect) is awarded after a comprehensive and rigorous exam focused on a broad spectrum of document and records management objectives. MCCi administers these services and concentrates on defining business requirements and the deliverables that follow.

Initial Implementation - The assigned MCCi Project Manager will perform a remote pre-installation solution development plan including configuration of security rules for the Client prior to installation and training. This consultation will include a review of current document organization and retrieval practices to determine desired indexing methods, as well as other basic system set up needs. Once this information has been gathered and provided to the MCCi project manager, the basic folder structure, document naming scheme, scheme, and template set-up will be configured prior to onsite training. Project Management Services may also be included for special projects, and remote training, as well as specific departmental needs.

Future Implementations (additional software) – MCCi Project Management services may be included to provide remote training and/or installation, template creation, specific consultation needs such as security set up, or others needs related to adding additional software and/or departments for the defined project.

These services are included to ensure the Client is prepared for the final project implementation.

GAP ANALYSIS

The MCCi Gap Analysis includes input by CDIA-certified MCCi professionals. The MCCi Gap Analysis is the study of the differences between two different information systems or applications, often for the purpose of determining how to get from one state to a new state. A gap is sometimes spoken of as "the space between where we are and where we want to be," and the Gap Analysis is undertaken as a means of bridging that space. MCCi offers Gap Analysis to new and existing MCCi customers, both with similar deliverables.

New customers may be totally new to Records Management/Document Management, or could be transitioning from one system to another. Either way, Gap Analysis not only serves the consulting needs of a project, but can also mitigate many risks that are inherent and in a new project. Risks such as scope creep, unforeseen needs (people, conversions, integrations, equipment), and unknown stakeholders, can be identified and cleared up in the very beginning of the project.

Existing customers may consider Gap Analysis when looking to expand their system into other departments or enterprise-wide. It is also a great opportunity to investigate and report on how the system is being used versus how it was intended to be used – the result being a plan of action.

Deliverables – The Gap Analysis process involves determining, documenting and approving the variance between business requirements and current capabilities. MCCi takes it a step further by providing recommendations and an action plan. The final deliverable is a report which will detail the following:

- A summary of the current document flow path, with recommended changes/requirements
- Equipment, software, and staffing recommendations
- Storage needs for each department
- Recommendations on the timing of phasing in departments (based on needs/complexity)
- Implementation plan

The amount of time/cost of a Gap Analysis is dependent upon the system size and number of departments to be involved.

LASERFICHE BASE SOFTWARE TRAINING SERVICES

The client is provided with either instructor-led hands-on training or train-the-trainer training in the operation of the Laserfiche Software and Plug-ins, and the scope of all training services to be performed is notated in the Statement of Work. Below are some sample outlines based on user-roles and system modules:

System Administration Training
- Client and Server Installation Procedure
- Users and Groups – Active Directory
- Security
- Templates
- Tags
- Document Relationships
- Records Management
- Volumes
- System settings
- Back up Procedures
- Troubleshooting Procedures
- Technical Support Overview

Full User Training
- Introduction to Laserfiche
- Folders and the Folder Browser
- Scanning and Importing
- OCR and Full Text Indexing
- Document Display
- Index Card/Templates
- Document Retrieval by Index Fields or Text (Searching)
- Annotations
- Extracting a Document from Laserfiche
- Briefcasing and Migrating Documents
- Customize Laserfiche
- Volumes
- Security

- Advanced Features – Plug-ins

Records Management Module Training
* Please note that client should have full knowledge of internal records management policies and have prior experience in records management.
- Record Series
- Record Folders
- Document Links
- Versioning
- Security Tags
- Vital records
- Cutoff criteria
- Cutoff eligibility
- Retention Period
- Disposition Actions
- Hold Period
- Time Dispositions
- Event Dispositions
- Interim Transfers
- Final Disposition
- Destruction
- Permanent Records
- Accession
- Freezing

Admin Console Setup for Records Management
- Cycle Definitions Setup
- Locations Setup
- Retention Schedules Setup
- Cutoff Instructions Setup

LASERFICHE WORKFLOW CONFIGURATION TRAINING

MCCi will work with the Client to configure a single defined process based on an agreed upon Measurement of Success (MOS).

Client Deliverables
- Provide MCCi with a mapped out/narrative of specified business process
- Define each resource and activity of the business process
- Define the Measurement of Success in conjunction with MCCi
- Appointment of Workflow Configuration Administrator
- Metadata requirements
- Sample reports from this process
- IT resources
- Test Database

MCCi Deliverables
- Up to 2 days onsite with an MCCi Project Manager
- Install and integrate Laserfiche Workflow with current Laserfiche system

- MCCi project manager to collaboratively identify the MOS
- Workflow process based on defined MOS
- Define and set up metadata structure to support the specified workflow process
- Offer best practices in security to support the specified workflow process
- Project Management services up until MOS signoff
- Workflow Managed Services for up to 30 days past MOS signoff date
- Workflow Configuration Administrator Training
- Workflow definitions report – initial and editable draft

Measurement of Success (MOS): Based on MCCi's experience, a pre-requisite for providing and/or receiving consulting services is to jointly define an attainable MOS. The MOS is intended to address the desired outcome of the workflow configuration and will be based primarily on the defined resources/activities provided by the client. A typical initial workflow configuration falls within scope listed below. If these levels are exceeded the business process will be broken down to stay within the scope of services to be offered herein.

Process Symbols	Maximum of 10
Decision Gateways	Maximum of 10
Interaction with external data sources	None *Interaction with external data sources is not funded through this package*
Document instance per process action	1 *Bulk processing is not funded through this package*
Custom Scripts	None *Custom Scripts are not funded through this package. Workflow process must lend itself to configuration within the Laserfiche Routing, Laserfiche Activities and General Activities of the Workflow Designer Toolbox.*

MCCi's Laserfiche Workflow Configuration Training service is designed to be highly collaborative. The primary end goal is for the client to have a trained Workflow Configuration Administrator and an initial business process (or one portion of a complex process) configured based on the defined MOS. As a prerequisite, the client's Workflow Configuration Administrator should be a business process savvy individual with good technical skills. This is the person tasked with handling future workflow configurations, including any modifications needed to the configuration of the specified business process.

LASERFICHE WORKFLOW CONFIGURATION TRAINING – TRANSPARENT RECORDS MANAGEMENT

Measurement of Success (MOS) for this service is configuring Laserfiche Workflow to facilitate Transparent Records Management for one department and up to four document types.

Transparent Records Management: Automatically classifying documents as they are created and route document to appropriate records series/record folder resulting in automatic calculation and assignment of cutoff and disposition eligibility dates. Folder structures are separated and created in the repository for records managers and non-records managers. Using entry access rights, the records management layout will only be visible to records managers and the document management layout will only be visible to non-records managers. Administrators will be allowed to see both. Using Laserfiche Workflow 8, the

process of classifying and filing records can be automated with security providing document access to both types of users.

Client Deliverables
- Appointment of Workflow Configuration Administrator
- IT resources
- Laserfiche Records Management Edition 8.x
- Laserfiche Workflow 8.x
- A strong understanding of Laserfiche's records management and document management tools, terms and concepts, especially with regard to Laserfiche security.

MCCi Deliverables
- Up to 2 days onsite with an MCCi Project Manager
- Configure Transparent Records Management according to the MOS
- Workflow process based on defined MOS
- Define and set up metadata structure to support the specified workflow process
- Offer best practices in security to support the specified workflow process
- Workflow Managed Services for up to 30 days past Transparent Records Management implementation
- Transparent Records Management Workflow Configuration Administrator Training
- Workflow definitions report – initial and editable draft

Measurement of Success (MOS): A typical initial Transparent Records Management workflow configuration falls within scope listed below. If these levels are exceeded the business process will be broken down to stay within the scope of services to be offered herein.

Process Symbols	Maximum of 10
Decision Gateways	Maximum of 10
Interaction with external data sources	None *Interaction with external data sources is not funded through this package*
Document instance per process action	1 *Bulk processing is not funded through this package*
Custom Scripts	None *Custom Scripts are not funded through this package. Workflow process must lend itself to configuration within the Laserfiche Routing, Laserfiche Activities and General Activities of the Workflow Designer Toolbox.*

MCCi's Transparent Records Management Workflow Configuration Training service is designed to be highly collaborative. The primary end goal is for the client to have a Transparent Records Management process configured based on the defined MOS. As a prerequisite, the client's Workflow Configuration Administrator should be a business process savvy individual with good technical skills. This is the person tasked with handling future workflow configurations, including any modifications needed to the configuration of the specified business process.

LASERFICHE WORKFLOW MANAGED SERVICES

MCCi 's Workflow Managed Services package is a post-implementation service, and is designed to assist the client's Workflow Configuration Administrator with ongoing consulting and configuration needs. Workflow Managed Services may be used for the following:

- Additional Workflow Set Up Consultation – MCCi continues to consult and make recommendations on best practices for modifying existing / creating new workflow configurations.
- Additional Remote Training – MCCi offers additional training for the client's Workflow Configuration Administrator. This is ideal for refresher training, as well as for new personnel in the event of turnover.
- Ongoing Security Consultation – Laserfiche security plays a much larger role when business processes are being automated by Laserfiche Workflow. MCCi assists the client's Security and Workflow Configuration Administrators to offer security best practices to align with workflow configurations.
- Leveraging existing system(s) – MCCi will help identify more efficient ways of utilizing the Laserfiche product suite, as well as how to leverage other systems and the related data contained therein.
- Meta-data consultation – Various meta-data objects must be created/modified to match up with specific workflow needs. MCCi will consult and help identify meta-data needs.
- Expiration & Additional Services - MCCi's Managed Services is an annual package and will expire on the same date as your SAP plan. Not to exceed The service can also be adjusted for any additional hours needed.
- Remote Access Support – Managed Services are delivered remotely. Remote Access Support allows our helpdesk staff to access your machines remotely to resolve problems faster. The use of Remote Access Support saves you both time and money by reducing the delays in resolving software issues without costly on-site visits.

AFFINITY INTEGRATION CONFIGURATION & TRAINING

Includes:
- Configuration of integration for up to one department within one application
- "Train the trainer" to empower the client to configure other integrations
- All services are conducted remotely, unless an MCCi representative is onsite for other implementation needs and onsite time permits

Client Deliverables
- Application to be integrated with must meet Affinity requirements
  - http://www.umdata.com/DataNOWAffinity/requirements.html
- Testing – A test copy of Affinity is available prior to purchase. *Client is responsible for testing to make sure needs are met prior to purchase*
- Assistance in defining the Measurement of Success (MOS)
- IT resources - Appointment of Affinity Administrator
- Laserfiche metadata requirements

MCCi Deliverables
- Install and integrate DataNow Affinity within current Laserfiche system environment pursuant to the Affinity requirements
- Assistance in configuring integration for up to one department within one application

- o At a minimum, if certain data fields cannot be mapped, MCCi will set up Affinity as an image enablement toolbar
- ○ MCCi project manager to assist with defining the MOS
- ○ Affinity integration configuration based on defined MOS
- ○ Define Laserfiche metadata structure to support the specified integration
- ○ Define Laserfiche security to support the integration
- ○ Project Management services up until MOS is met
- ○ Managed Services for up to 30 days past MOS
- ○ Affinity Administrator Training

Measurement of Success (MOS): Based on MCCi's experience, a pre-requisite for providing and/or receiving consulting services is to jointly define an attainable MOS. The MOS is intended to address the desired outcome of the Affinity integration configuration and will be based primarily on the type and capabilities of the application to be integrated with, along with how related data should be organized in the Laserfiche system.

MCCI LASERFICHE ARCHIVE SERVICES BY MUNISCAN

Laserfiche Archive Services are implemented by MCCi's MuniScan department. The service is designed to populate a client's new Laserfiche system with a subset of back-file records, which heightens the system training experience by having a great example to follow. To experience the complete benefit, it is recommended that Laserfiche Archive Services be completed prior to the initial system implementation. While one of MCCi's IT Project Managers consults with the client on the setup and configuration of Laserfiche, a MuniScan Project Manager will assist in determining the scope of the Laserfiche Archive Services based on budget, file types, quantities, indexing requirements, and the file structure desired. Laserfiche Archive Services helps to ensure a successful Laserfiche implementation and a high adoption rate from the very beginning of the Laserfiche project.

MCCi will scan documents using an interface that provides a wide variety of image output formats to allow for easy integration into your current records management system. These image formats include TIFF, JPEG, PDF, Laserfiche, etc. MCCi utilizes slip-sheets to determine document breaks and indexing information. The slip-sheet is created by MCCi to accommodate your organization's indexing needs. Once MCCi has received documents for scanning, the following process will occur according to the terms laid out in MCCi's pricing proposal and may vary according to services selected:

- ○ Pre-Scanning Consultation - A Pre-Scanning Consultation will be scheduled via a telephone conference after receipt of signed contract. This consultation is designed to go over the following: the signed contract and terms, folder structure, current searching methods, document naming scheme, slip-sheet customization, document preparation requirements, and document shipment and/or pick up.
- ○ Document Preparation - The process of document preparation begins with removing any materials that may prohibit the document from being fed through the scanner (i.e. Removal of documents from file folders, Removal of staples, paperclips, tape, clips, etc) and is described as Document Preparation. Upon completion of scanning, MCCi will organize the documents into their original order as received from the Client. Documents attached together by devices, such as staples and paper clips, will not be reattached.   Documents filed in folders, will not be re-inserted into those folders if MCCi uses separator sheets (all files and folders will still be kept in order).   The process of reattaching devices and/or re-inserting files into folders is described as Document Re-Preparation and offered in addition to Document Preparation only if requested by the Client.

- Document Organization & Indexing - Based on the scope of the project and outcome of your Pre-Scanning Consultation, MCCi will organize and index your documents. This will enable them to be searched and organized by three different methods. The first method includes organizing your documents in a tree-like folder structure, similar to Windows Explorer. This provides a visual method to store and locate your documents. The second method involves the use of electronic template cards. These templates contain unique information pertaining to that particular document. Once a template layout has been agreed upon, no changes can be made once the job has already been started. The third method includes running a process called optical character recognition (OCR), allowing for full-text indexing and searching capabilities. The OCR process converts printed words into alphanumeric characters dependent upon font and paper quality. This enables each occurrence of an OCR'd word to be searched and retrieved. Microfilm, Maps, and Handwritten documents will be searchable by keyword index only (via template card).

- Document Quality Control - MCCi performs a thorough quality control process after the job has been completed. Each scanned image is inspected for quality, legibility, and accuracy. Steps are taken to ensure each document has been captured, the quality of the scanned image is comparable to the original, and all manual indexing errors have been corrected. MCCi cannot be accountable for records not reflected in original inventory report as provided by Client. MCCi will correct only those discrepancies reported within 90 days after delivery of hard copy materials.

- Document Transportation - The client is required to package all materials per MCCi's instruction prior to delivery of materials to MCCi facilities. If the client chooses to utilize MCCi's pickup and delivery service (offered in select states), pricing is based on picking up the entire project described in the scope of services in one shipment. If additional trips are required due to the Client not having all the documents ready for pick up, additional charges will be applied. If the client chooses to ship via a certified carrier, the client incurs all shipping costs.

BUSINESS PROCESS ANALYSIS

MCCi will work with the Client to document a current business process. By interviewing process stakeholders and documenting facts and feedback, MCCi is able to deliver a comprehensive report. This level of engagement is typically done as a needs analysis exercise prior to attempting to automate an existing business process.

Client Deliverables
- Assignment of a Project Manager who will be responsible for:
    - Acting as the main point of contact for MCCi.
    - Identifying and providing contact information for process stake holders
    - Coordinating and scheduling site visits so that stakeholders are aware and set aside the appropriate amount of time to focus on working with MCCi
    - Coordinating and scheduling conference calls/web meetings between process stakeholders and MCCi as part of the document review process
    - Facilitating access to any/all resources needed for a thorough analysis
- Full participation by all process stakeholders in the interview, review, and finalizations stages

MCCi Deliverables
- Introductory call: Share contact information, and review scope of project
- Stakeholder Interviews: Up to 2 days onsite with Business Analyst
    - Conduct workshops and interviews with customers
    - Document Business Processes on whiteboard during workshops and interviews
- Business Process Report Drafting & Review: Up to 30 hours

- o Draft a Business Process/requirements document
- o Review document with customers and make revisions where necessary.
- ⊚ Business Process Report Delivery: Up to 1 day onsite with Business Analyst
  - o Onsite review and presentation of finalized report
- ⊚ Editable copy of Business Process Report for future use

RECORDS MANAGEMENT CONSULTING

When moving to an enterprise wide Electronic Records Management System, it is important for a Records Program and Records Policies to be in place beforehand. MCCi's Records Management Consulting service focuses on revision and/or creation of such programs and policies. If needed, the service should be completed prior to implementing MCCi's Laserfiche Records Management module. Pricing is dependent on the level of service needed and can be determined by setting up a meeting with MCCi and the appropriate Records Consultant. Services cover a broad spectrum to include designing records management plans, designing systems, identifying records eligible for destruction, assisting with legal compliance, providing training and nearly any other records and information related service requirement.

ELECTRONIC DATA MIGRATION

MCCi has the capability to migrate the Client's legacy data and provide the Client with the migrated data on CD/DVD/Removable hard drive in the desired format according to the specifications listed.

To determine which products are included with your project, please refer to the Statement of Work

LASERFICHE AVANTE
Laserfiche Avante solution is a named user model and starts out with a feature rich system that is based on the number of people who will be using the system. It is designed for small to mid size organizations and helps you capture, manage, distribute, and work with information in diverse working environments. Avante comes with Laserfiche Workflow and allows your organization to move beyond simple document routing to automate everyday tasks, optimize business processes, and share information with a wide variety of applications. Avante systems allow you to choose from SQL Express or full MS SQL platforms and incrementally expand the system with records management edition and other plug-ins such as auditing and batch processing. The Laserfiche Avante pricing structure makes it simple and affordable to add new features and functionality to your Laserfiche system as your needs change.

LASERFICHE RIO
The Laserfiche RIO solution is geared towards Enterprise clients with 100 named users or more. RIO and each RIO license comes coupled with Workflow, Web Access, Snapshot, Email, and Advanced Audit Trail. This licensing structure makes it much easier on IT administration, especially when dealing with a large user base. In addition, RIO supports an unlimited number of application servers, as well as repositories, making it well suited for expansion and testing needs. RIO can either connect to MSSQL or Oracle for the backend database, and of course many of the same optional Laserfiche modules such as the Records Management and Weblink Public Portal licenses are available with RIO.

Feature	Avante	Rio	Comments
Database	SQL Express, SQL, Oracle	SQL, Oracle	
Retrieval Users	Only Public Portal Web Link	Only Public Portal Web Link	Includes Email
Full Named Users	Unlimited	100 - Unlimited	Includes Workflow, Email and Snapshot for Avante; Includes Workflow, Email, Snapshot, Web Access and Advanced Audit Trail for Rio.
Retrieval Named Users	n/a	200 - Unlimited	Includes Email for Rio, minimum purchase of 1,000 users
Default Servers	1	Unlimited	
User License Model	Named	Named	
Model	WF automation / BPM	Enterprise	
Page Limit	Unlimited	Unlimited	
Public Access	Weblink Public Portal (25, 75, PP)	Weblink Public Portal (PP)	Unlimited versions are licensed per Laserfiche application server, and per processor. The licensed number of processors must be equal to or greater than the number of processors (CPUs) on the correlating Laserfiche application server.

Upgrade Path	Rio	n/a	
Laserfiche Versions	Lf 8.1 and later	Lf 8.0.1 and later	

LASERFICHE PLUG-INS

<u>Laserfiche Plug-Ins, Utilities, and Tools</u>
MCCi can provide additional Laserfiche Plug-ins Utilities, & Tools software. Laserfiche offers a selection of add-ons and development tools designed to let you tailor Laserfiche to meet your needs. Certain Plug-Ins may be bundled differently based on the Laserfiche platform.

Laserfiche Batch Processing Tools
- Laserfiche® Quick Fields™ automatically captures useful information from paper and electronic documents and organizes it for fast retrieval. Quick Fields transforms data capture from a costly and labor-intensive operation into an efficient process by collecting precise pieces of information from the masses of unstructured data flowing into your organization. Quick Fields improves the speed and accuracy of data capture while giving authorized staff instant access to the information they need to work effectively.

- Bar Code Validation Package - The Bar Code add-on reads bar codes on a specified page in the document. The value returned by the bar code process can be used to identify a page, populate a field, determine the document name, or determine where the document will be stored. Bar Code is very powerful when combined with Real Time Lookup. Supported barcode formats: Codabar, CODE 39, CODE 128, EAN 8, EAN 13, Interleaved 2 of 5, UPCA, and UPCE.

- QF Real-time Look up Validation Package: Lookup populates template fields and validates metadata by retrieving data stored in third-party databases and other applications.

- QF Zone OCR Validation Package: Images that contain clearly printed or typed information can be converted to text files through a process called OCR (Optical Character Recognition). Once text has been extracted from an image, it can be sent along with the image to the repository. Once the document has been imported into the repository, the extracted text will be associated with the corresponding image in the document. The International Zone OCR add-on will scan a zone on an image for text. Only text found within the zone will be extracted. The data returned by this process can be used to identify a page, populate a field, determine the document name, or determine where the document will be stored. The International Zone OCR add-on can be installed when Quick Fields is first installed or after it has already been installed.

- Laserfiche Import Agent: Laserfiche Import Agent is a capture tool that can bring files into a Laserfiche repository from the Windows file system. Any file that can be stored in Laserfiche can also be imported via Import Agent. What's more, Import Agent allows for scheduled and selective imports, so that users can set up specific criteria for what gets imported when. Import Agent can create fully OCR'd and indexed documents complete with template information and filed in the repository.

- QF Forms Alignment: automatically repositions scanned documents to match a master form, correcting for scanning errors and improving data extraction.

- QF Document Classification: designed for clients who deal with multiple forms, and will recognize and process multiple document types.

- QF Auto Stamp/Redaction/Bates Numbering - The Bates stamp option is a document auto-numbering annotation option
- QF Optical Mark Recognition: detects handwritten information, including marks on surveys, tests and ballots.
- Quickfields Agent: enables administrators to schedule forms processing around the clock and run Quick Fields sessions without operator intervention, reducing labor costs and optimizing business processes.
- QF Forms Identification: automatically recognizes the form or document based on its overall structure, even in the absence of bar codes, form data or other distinguishing information.
- QF Forms Extractor: removes form outlines to isolate data for more accurate capture.
- 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. ScanConnect 7.x is can be purchased as an add-on to both Laserfiche scanning and Quick Fields.
- Laserfiche Snapshot™ 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 file that can be opened with a Windows application that has printing capabilities. This feature is automatically included with every Full User purchase.
- OCR Scheduler for Laserfiche is a tool developed by MCCi and provides a simple and effective way to mass OCR documents in Laserfiche. It allows administrators to configure multiple OCR sessions. Sessions are created based on selecting folders within a specific Laserfiche Repository and scheduling the time to begin the OCR process. Benefits:
  - Efficiency: Clients can schedule the tool to perform the OCR function, rather than tie up machines during the normal working rhythm.
  - Support/Search Content: Leaving the responsibility in users hands to conduct OCR can lead to incomplete processing. The tool provides assurance that everything in need of OCR is being addressed without end user interaction.
    Requirements:
    - Laserfiche Server Versions: 8 (runs as a service)
    - Laserfiche Client version 8 is required
    - Laserfiche Licensing Recommendation: 1 dedicated LF Named User license
    - Windows Operation Systems: 32 & 64 bit
    - Does not support OCR for Electronic Documents.

Distribution Plug-Ins
- Laserfiche WebLink™ the WebLink module publishes select documents in a Laserfiche repository to an intranet or the Internet in read-only form. Documents can be made available through the Web almost instantly, and users need only an Internet browser in order to access them. Built on ASP .NET, WebLink can be customized to match the look and feel of an organization's Internet or intranet site.
- Laserfiche WebAccess Laserfiche Web Access is a Web browser-based thin client offering virtually all of the document management capabilities of the standard Laserfiche interface. Web Access allows your IT staff to roll out high-volume Laserfiche access without increasing your organization's

application support burden. Authorized users organization-wide enjoy simultaneous access to documents, whether they are using the corporate intranet or logging in from a branch office.

- Laserfiche Plus™ Laserfiche Plus allows the information stored in a Laserfiche repository to be portable. Laserfiche documents published by Laserfiche Plus can be viewed by anybody, regardless of whether they have Laserfiche installed. If these portable Laserfiche documents are sent to a company or site that already has Laserfiche installed, then that organization can also choose to attach those documents to their repository. This software prepares a copy of the Laserfiche files (images, text, electronic files, annotations, templates and field data) for burning directly to your removable media or to a temporary directory. Choosing to publish to a temporary directory allows you to write it to your removable media at your convenience.

- Laserfiche E-Mail Plug-in™ allows instant electronic document distribution via standard MAPI-compliant e-mail applications. This feature is automatically included in every Full User and Retrieval User license purchase.

Workflow& Process Automation
- Laserfiche Workflow: Efficiency and accountability-enhancing document routing, e-mail notification and audit trail reporting.

- Laserfiche Audit Trail Modules: Three levels of audit reporting to address your specific regulatory compliance and security needs.

  - The **Starter Edition** tracks basic events that occur in the repository and that involve accessing, modifying or exporting data. Basic events include creating, editing, printing or deleting documents, creating annotations, and assigning metadata.
  - The **Standard Edition** builds on the Starter Edition by tracking additional security- and access-related events. This edition can also track unsuccessful attempts to perform an action, such as failed attempts to access or print documents.
  - The **Advanced Edition** meets the needs of organizations in the most highly regulated environments. It includes all the functionality of the other two editions, and also tracks many more events including password changes, the creation or modification of users and groups, and changes to repository-wide settings. It can also track all the searches users perform, require users to enter reasons for performing certain actions, and automatically add watermarks to printed documents.

Laserfiche Integration Plug-Ins
- LF Integrator's Toolkit: Tools & documentation necessary for customizing Laserfiche

LASERFICHE THIRD PARTY PLUG-IN OFFERINGS

Integration
- DataNow Affinity Integration- DataNow Affinity brings the power of Laserfiche document management to the applications you use most. Document searches can be reduced to a single click of a button. New documents can be added to your Laserfiche repository without manually entering template field values, file names, or folder locations. Affinity truly makes Laserfiche feel like part of your business software

- LF Integrator GP – LF Integrator empowers Great Plains users to scan, search and link supporting documents in Laserfiche document management applications directly from the Great Plains menu bar. Link the document and workflow management power of Laserfiche with your current Great Plains implementation.

- LF Integrator AutoCAD – LF Integrator for AutoCAD allows you to store AutoCAD drawing files or associated documents in Laserfiche, including embedded cross reference files, directly from the AutoCAD menu. Launch Laserfiche scan or search modules using the drawing file for template or search criteria, or create a Laserfiche document template using the fields from any AutoCAD drawing title block with a single click.

- GeoDocs: GeoDocs™ is a web-based software that seamlessly integrates ESRI ArcIMS (soon to be ArcGIS Server) and Laserfiche. Utilizing robust search capabilities, users of GeoDocs can access digital documents stored in a Laserfiche repository from within the web-based GIS program and vice versa, access spatial information stored in a GIS from within the Laserfiche web client.

Email Archival

- TrustedEdge (email and document archival)- The Trusted Edge® Solution automatically captures, classifies, and manages unstructured information created, accessed, and stored at the network's "edge" – on laptops, desktops, and file shares – where 80% of documents are created and stored. Following a Trusted Edge deployment, organizations can proactively apply enterprise-wide policies to desktop information and email at the point of creation and use - and manage content based on centrally-defined business rules. Furthermore, by intelligently identifying, classifying, and securely routing critical email, documents, and files to their appropriate location with the enterprise content management or records management platform, Trusted Edge improves retention compliance, mitigates litigation risk, and reduces enterprise storage costs. With its rich set of policy management and information management features, Trusted Edge is leveraged by organizations as a unified platform which can be deployed as the foundation for numerous enterprise solutions including:

Electronic Forms

- LincDocs (Electronic Forms)- LincWare's LincDoc family of eForm creation and document automation tools empowers businesses and government organizations to better serve their customers and constituents, reduce costs and better leverage bottom line critical information. LincDoc data complies with existing systems through features like network-wide interconnectivity, document repositories, version control, business-logic driven data entry, Laserfiche interface, database integration and Word- and PDF-based document authoring.

Physical Records Management

- InfoLinx (physical records management software) - InfoLinx provides both custom and commercial-off-the-shelf records and information management system software and professional business services to manage critical business documents. InfoLinx seamlessly integrates barcode and Radio Frequency Identification (RFID) technology, physical file and electronic record tracking, retention schedule management, color-coded label printing, and document imaging into an integrated, intuitive, and user-friendly records management application.

When you become a client of MCCi, you gain much more than just a new product. You gain a relationship between our staff and your organization to make your product implementation successful and the usage of your product an enjoyable experience. In order to make this possible, MCCi offers both Proactive and Technical Support.

PROACTIVE SUPPORT

MCCi assigns each account with a Regional Account Executive and an internal Account Manager Team. You will have already worked with your Account Executive in the pre-project phase and they will continue to support you. Your Account Executive will provide a local presence and contact information should local meetings be necessary. The Account Executive also assists in pre implementation processes.

Your Account Manager will assist in managing ongoing support through the life of the product. MCCi believes in a proactive support methodology and it is the Account Managers' role to insure this ongoing communication with clients. Your Account Manager will be in touch throughout the year to discuss optimal system usage and ensure client satisfaction. Items discussed may include, but are not limited to:

- Identify any needs that could easily be addressed with the current system.
- Provide resource for question and answer, best practices, how other customers are using the system with use of documented case studies, Listservs, support center, etc.
- Provide continued education for existing and new users within the organization through the use of webinars, seminars, workshops, users group, and more.
- Annual review of current system configuration
- Dedicated sales support staff for pricing inquiries and budgetary information
- Annual support renewal notification to ensure your renewal process is timely and accurate

Educational Resource Definitions
- *Case Studies*- MCCi works with our clients to put together narrative accounts of specific usages of MCCi solutions in their organization. Specific departments, document types, integrations, etc. are noted to allow other users to learn from the information.
- *MCCi Listserv*- MCCi has created a Listserv for specific types of system customers. A Listserv is a creative use of e-mail, which provides a means for End Users to share information on a common interest. Members are able to communicate with peers thru a single e-mail. Uses of the Listserv may include fielding requests about system usage, as well as best practices.
- *Support Center*- This resource is a compilation of white papers, best practices, and information for system users all in one location. Through the support center, users can also submit and check the status of their support tickets.
- *Webinars*- MCCi conducts monthly webinars on different topics promoting more efficient system usage. User webinars are also offered on more specific topics related to products, concepts, departments, etc regarding the usage of your system. These are done through the web and are a convenient way of staying informed on the newest technologies available.
- *Seminars*- MCCi conducts seminars on different topics to help educate new and existing end users throughout the year. They are usually located at a host site of an existing customer. These can also be offered at current client's locations to invite departments to learn more regarding their current system.
- *User Groups*- MCCi offers annual user groups to keep end users trained on the newest versions and products. These are geared to both users and administrators of the system.

TECHNICAL SUPPORT

The Laserfiche Software Assurance Plan (LSAP) helps preserve your investment and extend the benefits of your original purchase by providing you access to the assistance needed to ensure that you maximize system uptime. You have access to a toll free line to call for technical support or submit tickets online through our support center. When you subscribe to the LSAP you receive the following benefits:

- 100% upgrade credit for your existing software (in the event of an upgrade)
- Free software updates for your current system
- 24-hour FTP and website access which includes the MCCi Online Support Center
- Technical bulletins and newsletters

MANAGED SERVICES

MCCi Managed Services are strongly encouraged to be included with every support renewal and provide the client with a discounted hourly rate by purchasing an advanced block of services per year based on the products purchased. Managed Services can be used for the following professional services:

- Additional Training – additional training, via web conferencing, can be conducted to train new users on the use of the system or as refresher training for existing users.
- Additional System Set Up Consultation – MCCi offers additional consultation that includes recommendations on best practices for adding additional departments, additional types of document etc. to your current system.
- Remote implementation of software updates – While the standard SAP plan covers free updates for software, implementation of those updates is sometimes overlooked. With the addition of our Managed Services, MCCi is at your service to directly assist in implementing software updates such as minor updates, quick fixes or point releases. Major software upgrades may or may not be covered and should be discussed with your Account Management Team.
- Annual System Review & Analysis – Upon request, MCCi will access your system to review and analyze how your organization is using the system, identify discovered potential problem areas and make recommendations for better use of the system. This analysis is designed to be implemented 6 months after the initial Software installation, and should be performed annually after that date. This is an optional service that will be completed only if requested by the Client.
- Remote Access Support – Remote Access Support allows our helpdesk staff to access your machines remotely to resolve problems faster. The use of Remote Access Support saves you both time and money by reducing the delays in resolving software issues without costly on-site visits.
- Expiration & Additional Services –MCCi Managed Services is an annual package and will expire on the same date as your SAP plan.

MCCi does provide continued technical support for all MCCi applications. Technical support is provided via email or telephone during normal business hours of 8:00 AM to 6:00 PM EST. Clients can designate several individuals who are to be the technical support contacts. Those individuals may contact MCCi at any time for technical support. There is no limit on the number of technical support calls that can be made. Adjustments in annual support rates may be made to coincide with current U.S. inflation rates.

MCCi will provide necessary consultation as to the compatibility of current hardware with the Laserfiche System. Changes and recommendations will be made at the time of consultation. See system requirements below. Please keep in mind that these are the minimum system requirements.

Scanning Station PC:

OS:	Windows XP Professional (Service Pack 2 or later), Windows Vista, Windows 2003 (Service Pack 1 or later), or Windows Server 2008
CPU:	2.4 GHz processor or faster
Memory:	1 GB RAM or more
Communications:	TCP/IP
Web browser:	Internet Explorer 6.0 or higher

Client:

OS:	Windows XP Professional (Service Pack 2 or later), Windows Vista, Windows 2003 (Service Pack 1 or later), or Windows Server 2008
CPU:	1 GHz Processor or better, Performing OCR: Dual Core 2.4 GHz or faster processor
Memory:	1 GB RAM or more
Communications:	TCP/IP
Web browser:	Internet Explorer 6.0 or higher

Server:

OS:	Windows Server 2003 (Service Pack 1), or Windows Server 2008
CPU:	Dual Core Processor, 2 GHz Processor or better
Memory:	2-4 GB RAM
Communications:	TCP/IP

Database Management System

Avante SQL or Rio SQL:	Microsoft SQL Server 2005 (Service Pack 3 or later), Microsoft SQL Server 2008 (Service Pack 1), Oracle 9i Release 2 (9.2.0.8+), Oracle 10g (10.2.0.4+), Oracle 11g (11.1.0.6+)
Avante SQL Express:	Supports MSDE (Service Pack 3 or later) and Microsoft SQL Server 2005 Express Edition (Service Pack 2 or later).

Note: Oracle or Microsoft SQL Server must be purchased separately. You must additionally purchase enough licensing for your DBMS to support your Laserfiche installation.

Weblink Public Portal:

OS:	Windows Server 2003 with IIS 6, Windows Server 2008 with IIS 7
CPU:	2.8 GHz or faster processor
Memory:	1 GB RAM or more
Viewer:	Web Browser (minimum versions): WebLink is best viewed using Internet Explorer 6, Internet Explorer 7, Internet Explorer 8, Firefox 2, Firefox 3, Safari, Chrome, and Opera.

Laserfiche RIO version licensing specifics:
Public Portal is sold per Laserfiche application server, per processor. It allows unlimited read-only connections to that Laserfiche Server, as many as the machine can handle. The Public Portal License allows unlimited connections, however a large numbers of connections may affect Laserfiche Server performance (one processor can handle roughly 100 to 150 concurrent retrieval connections). You must have one Public Portal License for each CPU on the Laserfiche Server computer that WebLink will connect to, or you must have a dual-processor or multiprocessor license for a Server computer with two or more processors. Public Portal Licenses may only be used with WebLink; they are not available for other applications.

Scanners:
Must utilize ISIS drivers to be compatible with Laserfiche ScanConnect software. MCCi also recommends confirming scanner compatibility by referencing the most up to date Laserfiche published supported scanner list at http://laserfiche.com/static/Resources/scanlist.html.

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The terms of this agreement shall remain in force and effect for a period of ninety (90) days from the date appearing below, unless accepted by the Client.

Submitted by: **MCCi,** a Limited Liability Company

Date: March 31, 2011

By: _____
                                        (Signature)

                          _____
                                   (Printed Name & Title)

Witness: _____
                                        (Signature)

Noted Items Accepted by: **SURFSIDE, FL**

Date: _____

By: _____
                                        (Signature)

                          _____
                                   (Printed Name & Title)

Witness: _____
                                        (Signature)

                          _____
                                   (Printed Name & Title)

MCCI, a Limited Liability Company and subsidiary of MUNICIPAL CODE CORPORATION, which is duly organized and existing under the laws of the State of Florida, hereinafter referred to as MCCI, hereby offers the Laserfiche Software & Services to the Town of SURFSIDE, FL according to the following terms and conditions.

LASERFICHE SOFTWARE UPGRADE
When software is upgraded, the old copy of the software must be returned and will no longer be a valid copy. Proof of previous purchase is required to receive upgrade. Upgrade credit applied towards new purchase is 100% of original software purchase price. The difference between the new system (server, full and retrieval users) price and the old system (server, full and retrieval users) price must be greater than or equal to 10% of the new system price. Otherwise, a minimum software upgrade adjustment will be applied to comply with the 10% price difference requirement. One year of LSAP must be purchased for new products when upgrading. LSAP of the original product will not be credited. However, remaining months of SAP can be applied towards the new purchase of one year of LSAP for the new products.

SOFTWARE ASSURANCE PACKAGE (SAP)
Software Support is provided by MCCI and the manufacturer. MCCI acts as 1st tier support and works with the manufacturer at a 2nd tier level when needed. MCCI's Software Assurance Packages include: Access to software point release updates, Telephone or E-Mail support for software related issues, 24-hour FTP and web site access, technical bulletins and newsletters. Adjustments in annual support rates may be made to coincide with current U.S. inflation rates – any increase will not exceed the cumulative increase in the Consumer Price Index (CPI) occurring since the last price increase. Any updates requiring shipment of software require Client to pay shipping costs.

Customers may contact MCCI support via MCCI's Online Support Center, email (support@mccinnovations.com), or telephone 866-942-0464. Support is available Monday-Friday (excluding major holidays) from 8:00 a.m. – 6:00 p.m. EDT.

SERVICE LEVEL AGREEMENT (SLA)
MCCI's SLA is offered in addition to the Software Assurance Package. It is required in some circumstances, and offers the customer escalated response times depending on the severity of the support issue, as well as extended support hours and many other additional benefits. The SLA documentation is readily available upon request.

MCCI SOFTWARE CUSTOMIZATIONS
The customer may elect to contract with MCCI to customize the standard software. As standard software is upgraded, any customizations performed will require support in the form of updating through our Integration Support Assurance Program (ISAP). ISAP must be current to receive updates to the integration at no additional charge. Otherwise current hourly rates will apply.

Upgrades to existing programs, or the acquisition of new programs from vendors other than MCCI, may have an effect on customizations made to the software by MCCI. MCCI will not be held responsible if upgrades or changes made by the customer or another vendor or application preclude the operation of MCCI's customizations.

CLIENT SOFTWARE CUSTOMIZATIONS
The client may also choose to customize their software internally, without MCCI's help. MCCI is not responsible for any damages caused by the user's customization of the software. MCCI will not be held responsible for correcting any problems that may occur from these customizations. Routine updates to the software may affect any customizations made by the user. If MCCI's help is required to correct/update any customizations made by the client, appropriate charges will apply.

CLIENT INFORMATION TECHNOLOGY ASSISTANCE
In order for MCCI to excel in customer service, the client must provide timely access to technical resources. The client must provide adequate technical support for all MCCI installation and support services. If the client does not have "in-house" technical support, it is the client's responsibility to make available the appropriate Information Technology resources/consultant when needed.

SOFTWARE INSTALLATION
MCCI will install all software outlined herein. If additional software is needed to bring the site up to specifications, customer will be billed accordingly.

SITE PREPARATION
The Client site should be ready for installation according to specifications outlined within the Hardware section listed below. If site is not prepared and results in cancellation, delays, or rescheduling of an installation after MCCI has made travel arrangements, the client may incur expenses due to circumstances such as non-refundable airline tickets, training/install charges, hotel reservations, rental cars, etc.

ARCHIVE SERVICES BY MUNISCAN TERMS AND CONDITIONS
DOCUMENT STORAGE: MCCI's facilities contain secure rooms for hardcopy "work in progress" document storage that are designed to prevent damage from natural disasters. MCCI will arrange for the return of hardcopy documents to the client after completion of scanning. If documents reside at MCCI facilities for a period longer than 90 days after a request for delivery has been made, storage charges will apply. MCCI is not responsible for maintaining permanent archive and accepts no responsibility to loss of electronic data.

ENTERPRISE WIDE SCANNING SERVICES: In accordance with the terms and conditions as laid out here within, MCCI can provide any department in the organization with scanning services for documents other than those described in Section I of the pricing proposal. Costs will be based on the attached pricing schedule (Exhibit A). MCCI will consult with each department interested in beginning their own MuniScan project to determine individual scanning and indexing needs. For further information and instruction regarding this service please contact our Service Bureau Manager.

MICROFILM & FICHE CONVERSION SERVICES: MCCI offers electronic conversion services for microfilm, microfiche, and aperture cards. The Client will provide MCCI with data to be converted to electronic format. MCCI will extract the images contained on the film/fiche and migrate them to Laserfiche or to another industry standard format as requested by the Client. The images will be captured based upon the reduction ratio and threshold between

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the beginning and ending of new images on the original film. MCCI is not responsible for the accuracy of existing image quality, such as black borders, skewed images, blurring images, non-legible images, or other errors that are not controllable by MCCI. Unless otherwise specified in the project scope, MCCI will index by the roll/card number or unique identifier.

PROJECT TIMELINE: MCCI will complete and deliver the project within 90 days after receipt of documents. Should MCCI require additional time, the Client will be notified immediately. The delivery for routine updates to the database will be within 30 days.

PRICING: Charges apply on a per project basis and are dependent upon size and volume of documents. MCCI requires having the entire project in bulk, rather than in small quantities. Breaking the project into smaller quantities will affect the volume pricing, and additional charges per image may apply. A sample may be required prior to confirming large volume job pricing.

UNANTICIPATED DOCUMENT TYPES & SIZES: The prices quoted are made with the expectation that customer will properly prepare and annotate materials for scanning bureau use and that documents are consistent with the description provided in the scope of services. If documents are not as initially represented, additional charges will apply according to Exhibit A. MCCI will call for authorization to proceed with the project.

LASERFICHE SYSTEM CUSTOMERS: Due to requirements by Laserfiche systems regarding the importing of images and indexing information, it is highly recommended that Clients who already have a Laserfiche system have their documents scanned using only Laserfiche software. This will ensure that all associated indexing information will be properly retained after the importing of images into the Laserfiche system. MCCI has knowledge of the software versions, indexing requirements, and compatibility issues for each of our Laserfiche system clients. For these reasons, MCCI should be considered as a Sole Source provider for scanning services.

MCCI CERTIFIED PARTNERS: MCCI maintains MuniScan partnerships for the purpose of additional capacity and flexibility in meeting client expectations. In the event MuniScan partners are used for a project, the management and support of the project is handled directly by MCCI.

ADDITIONAL SERVICES
As an additional service/product under this contact MCC and MCCI can provide the following:
- Electronic Agenda and Legislative Management (Legistar). MCCI offers Legistar Software and related services which provides electronic automation and creation of Agendas.
- Document Scanning Services (MuniScan). MCCI offers scanning, indexing and integration of hard copy documents with Laserfiche Software to provide the Client with the most powerful index retrieval search engine available with the following features: intuitive browse window, index cards, and fuzzy logic.
- Contract Management Software (Contract Assistant). MCCI offers the Contract Assistant Software (developed by Blueridge Software) which is a web based solution designed to provide control and automation of the contract management process.
- Code Supplementation and Codification Services (MuniCode). Municipal Code Corporation offers supplementation of existing Codes, Codification of Ordinances and Recodification of existing Codes. Our optional services include legal review, republishing, editorial and index work and electronic options (CD, Internet).
- Utility Billing Services (MuniBills). MCCAdvantage offers billing, statement and remittance processing services as an additional benefit under this agreement. MCCAdvantage, a subsidiary of MCC, can provide the client with design, printing and mailing services for customer billing/statements of all types. These services also include remittance payment options, software and other billing solutions.

AGREEMENT EXTENDED TO OTHER GOVERNMENTAL UNITS
MCCI agrees to allow any other Government agency to purchase items, at the same terms, conditions and pricing as this contract during the period of time that this contract is in effect. Minor changes in terms and conditions may be negotiated by MCCI and participating Government agencies. Any orders issued against this agreement shall be the sole responsibility of the Government agency placing the order. It is understood that the Client shall incur no financial responsibility in connection with any purchase by another Government agency.

TRAVEL EXPENSES
If the client cancels or reschedules an installation after MCCI has made travel arrangements, travel expenses may be incurred due to circumstances such as non-refundable airline tickets, hotel reservations, rental cars, etc.

LIMITED LIABILITY
In no event shall MCCI's total liability to the client exceed the project fees paid to MCCI by the client.

FORCE MAJEURE
Neither party shall be liable for any delay or failure in performance due to causes beyond its reasonable control.

TERMINATION
The services provided in this agreement will be in full force and effect for a period of three (3) years from the date of shipment of the completed product to the organization. Thereafter, this agreement will be automatically renewed from year to year, provided that either party may alter or cancel the terms of this agreement upon sixty (60) days' written notice.

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Purpose

The purpose of this Support Service Level Agreement (SLA) is to formalize an arrangement between MCCi and the client to deliver specific support services, at specific levels of support, and at an agreed-upon cost. This document is intended to provide details of the provision of level 3 application support services to the client. This SLA will evolve over time, with additional knowledge of the client requirements, as well as the introduction of new applications and services into the support portfolio provided to the client.

Scope of Agreement

The following services are provided in response to the transfer of trouble tickets from the client to MCCi in accordance with MCCi's case management process.

Services Automatically Provided Under This Agreement

The following services are provided in response to the transfer of trouble tickets for level 3 support from the client to MCCi:

1. **Corrective maintenance**—Defined as activities associated with correcting software errors and/or system disruptions caused by software related issues.

   - **Four business hour response time** – For Severity Level 1 and Severity Level 2 support requests.
   - **Extended support hours** – Extends regular support by adding three additional hours (5PM – 8PM EST)
   - **Unassisted remote access** – Rather than requiring a client user to monitor and aide in remote support sessions, MCCi will work in an unassisted environment when appropriate and when granted access.
   - **Root-cause analysis**—Analysis of the root causes of problems. Problems will be reviewed to determine their root causes, measures will be taken to correct the sources of the problems, and responses will be distributed in a timely fashion.
   - **Application of available bug fixes**—Defined as the emergency repair of any system operation that does not comply with the current system specification. This includes system errors, "hung" or halted screens, or unexpected results within the system that render it unusable for the purpose for which it was designed. MCCi relies on the partner software manufacture to provide such bug fixes.

2. **Ticket status updates**—MCCi will provide direct access to it's ticket tracking system for monitoring purposes

Requests for Services NOT Covered Under This Agreement

This agreement does not cover the following requests. However, MCCi would be pleased to provide a separate statement of work in proposing services to address any of the following:

1. **Evaluation of new software or hardware**—Evaluation or approval of new software or hardware for use within the client. This includes systems developed outside of the client, such as third-party systems, or systems developed by the client.

2. **Procurement of new software or hardware**—Procurement of new software or hardware for use within the client, or for use for the client at MCCi. If client requires a specific remote access software to be used for support, all software or hardware required for MCCi's use to support the client's applications will be the responsibility of the client.

3. **On-call MCCi support management**—MCCi's support managers are not required to be on call. If at a later date the client requires the support manager to be on call for a specific purpose, or on a longer-term basis, then the time must be scheduled and the client shall be charged additional for this service.

4. **Level 1 and 2 support**—Level 1 (help desk) and level 2 (infrastructure support) shall be provided by the client for each production application to be supported, and they shall perform their assigned duties, such as Operating System software, Web server, authentication software, software installation, application installation on production servers, database connections, client software installation, and database changes, for the duration of this agreement.

5. **Backup Services** – Any and all back up services are the responsibility of the client.

6. **Specific training**—Training packages are available at an additional charge based on client needs. Clients can procure annual training packages through renewal of "Managed Services" or have the option of purchasing training and/or consulting when needed.

7. **Major upgrades to applications supported by MCCi** – The level of effot required to upgrade from one major version release to the next is uncertain until it becomes available and has been tested. Major version upgrades typically require professional service assistance, while point release updates to existing versions are supported as part of the service level agreement. Access to updated and new version licensing always requires and active software maintenance plan, which is separate from MCCi's SLA.

8. **Upgrades to application software and associated hardware that is not directly supported by MCCi —** This includes operating system upgrades, database upgrades, authentication software upgrades, and and other third-party vendor-required upgrades. The clients IT infrastructure and management of other internal applications are the responsibility of the client. Prior to upgrading a related application or hardware device, MCCi does require the client contact MCCi Support to ensure compatibility.

9. **Assistance with application usage**—Advice about or education on how to use applications, including completing transactions, creating users within or for an application, or on the purpose of an application. Training packages are available at an additional charge based on client needs. Clients can procure annual training packages through renewal of "Managed Services" or have the option of purchasing training and/or consulting when needed.

10. **Assistance with application usage when unsupported or nonstandard hardware or software is involved—** Use of unsupported or nonstandard hardware or software often results in unexpected behavior of otherwise reliable systems.

11. **Manufacturer's Software Maintenance Renewal** – The renewal of the manufacturer's required maintenance package is not included in MCCi's SLA. It is a separate and required renewal item, however MCCi makes every effort to align renewal dates for ease of administration and record keeping.

12. **Managed Services** – Managed Services are not included in MCCi's SLA. Managed Services are a separate and optional renewal item. Managed Services are typically utilized as pre-purchased discounted time for the purposes of additional training, consultation, professional services, etc. The majority of MCCi clients elect to have Managed Services as part of their annual software renewal package.

13. **Modifications to original application configurations**—Changes in the client's organization or business needs (such as a reorganization or change in business process) may make the current configurations obsolete. When this occurs, the client should engage MCCi through Managed Services or custom packaged Professional Service options. It is highly recommended that the client manager and MCCi work closely together to anticipate future needs and prepare timely updates of systems to accommodate the client's constantly changing business.

Applications Covered

This agreement is for services related to support requests concerning the production applications sold and supported directly by MCCi and that have an active Software Assurance Plan.

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Processes and Procedures Related to This Agreement

Call Management Process

MCCi's problem-ticket system will be used to record and track all problem reports, inquires, or other types of calls received by level 3 support. This provides MCCi with the ability to provide metrics in regard to this SLA.

Metrics

Metrics Reporting

Standard reports are available upon request. These reports are expected to be produced by MCCi's problem-ticket system, which will detail ticket management performance against SLA targets. Metrics only include the support requests that are transferred to MCCi for resolution. The metrics will be reported via existing standard problem-ticket system reports as available.

Support Metrics Real-time Monitoring

The client has the ability to track and monitor individual support cases in real-time by utilizing MCCi's problem-ticket system. A requirement is that the client use MCCi's problem-ticket system to enter problem tickets.

Dependence on Other Organizations

MCCi is dependent on other internal groups within the client of services (i.e., help desk, network administration, database services, etc.), and external suppliers (i.e. integrated application providers, hardware providers, etc.) in providing application support services to the client. The client will manage the interface into those suppliers as it relates to the provision of services under this agreement. MCCi is also dependent on MCCi software partners in regards to providing 2nd tier and escalation of support cases when needed.

The list of organizations and vendors that MCCi is dependent on may change during the term of this agreement.

Appendix A

Definitions

<u>Support Request</u>

For the purposes of this agreement, a Support Request is generally defined as a request for support to fix a defect in existing application code or a request for support that involves no modifications to application code, such as a question.

<u>Levels of Support</u>

There are three levels of support, only one of which (level 3) is provided under this agreement. These levels, which are integrated into the the client's support process, are defined as follows:

- **Level 1**—This is support provided by the client's internal help desk when it receives the Support Request from a client end user. This represents generalist support. If this level of support cannot resolve the problem, the Support Request is passed to the client's level 2 support, which is the infrastructure support specialists.

- **Level 2**—This is support provided by a the client infrastructure support or subject matter specialist. Operational issues will be resolved at this level. If resolution requires additional assistance, the Support Request is passed to MCCi's level 3 support.

- **Level 3**—This is support provided by a MCCi application support specialist. This level of support does remotely perform point release version updates and application of available bug fixes, if required to resolve the problem. All level 3 contact/ticket reporting is handled by the client's level 2 support contact.

<u>Severity Codes</u>

The following characteristics are used to identify the severity of a problem report:
- Business and financial exposure
- Work outage
- Number of clients affected
- Workaround
- Acceptable resolution time

It is not necessary (nor is it likely) to have perfect match of each characteristic to categorize a problem report at a particular severity level. A given problem must be judged against each of the characteristics to make an overall assessment of which severity level best describes the problem. The level 1 support agent and the client jointly determine the initial severity rating for the report. Level 2 and level 3 support personnel may then negotiate with the client to modify this severity after the report is elevated to them.

Severity 1 (Critical)	Severity 2 (High)	Severity 3 (Medium)	Severity 4 (Low)
Business and financial exposure			
The application failure creates a serious business and financial exposure.	The application failure creates a serious business and financial exposure.	The application failure creates a low business and financial exposure.	The application failure creates a minimal business and financial exposure.
Work Outage			
The application failure causes the client to be unable to work or	The application failure causes the client to be unable to work or	The application failure causes the client to be unable to perform *some*	The application failure causes the client to be unable to perform a

Severity 1 (Critical)	Severity 2 (High)	Severity 3 (Medium)	Severity 4 (Low)
perform some significant portion of their job.	perform some significant portion of their job.	*small* portion of their job, but they are still able to complete most other tasks. May also include questions and requests for information.	*minor* portion of their job, but they are still able to complete most other tasks.
Number of Clients Affected			
The application failure affects a *large* number of clients.	The application failure affects a *large* number of clients.	The application failure affects a *small* number of clients.	The application failure may only affect one or two clients.
Workaround *[This bullet carries the heaviest weighting of the characteristics for Severity 1 and 2.]*			
There is no acceptable workaround to the problem (i.e., the job cannot be performed in any other way).	There is an acceptable and implemented workaround to the problem (i.e., the job can be performed in some other way).	There may or may not be an acceptable workaround to the problem.	There is likely an acceptable workaround to the problem.
Response Time			
Within four hours	Within four hours.	Within eight hours or by next business day (EST).	Within eight hours or by next business day (EST).

Appendix B

Roles and Responsibilities

<u>the client</u>

the client has the following general responsibilities under this agreement:

- the client will conduct business in a courteous and professional manner with MCCi.
- the client users, clients, and/or suppliers using the applications stated in the Statement of Work will use the appropriate help desk to request support.
- the client will use their own appropriate help desk to provide level 1 support, including creating problem tickets and work orders and assigning responsibility to the appropriate level 2 client resource.
- the client will use their own appropriate IS group to provide level 2 server, network, firewall, and infrastructure support services, including Operating systems, Web server, authentication software, software installation, application installation on production servers, database connections, and database changes.
- the client will provide all information required to open a support request.
- the client will assign severity codes adhering to the correct usage of these codes as defined in the client's case management process.
- Once a support request has been submitted, the client will make themselves available to work with the MCCi support resource assigned to the support request.
- the client end users do not contact MCCi support resources directly to report a problem. All problem calls must be logged through the appropriate help desk. This ensures maximum availability and response times.
- the client will continue to provide MCCi access, software, licensing, training, documentation, and support of its remote access software if it requires MCCi to utilize specific software to provide remote support. Otherwise MCCi will utilize it's exsitng client user-assisted remote access tools.

<u>MCCi</u>

MCCi has the following general responsibilities under this agreement:

- MCCi will conduct business in a courteous and professional manner with the client.
- MCCi will log all information from the client required to establish contact information, document the nature of the problem and the client's hardware/network environment (as applicable).
- MCCi will attempt to resolve problems over the phone on first call.
- MCCi will escalate support request to next level of internal support within MCCi upon approach of escalation points.
- MCCi will obtain the client's approval before ticket closure or may close the ticket if 3 business days elapse without an update from the client.
- MCCi will be the interface on behalf of the client to MCCi's partner software manufacturers

There are several roles deployed within MCCi that are integral to the provision of support services to the client. These roles include the following:

IT Director/Support Manager

The MCCi IT Director will provide the overall direction of the activities of the support specialists, and will participate directly in the production of the associated deliverables when needed. This individual will reports to the MCCi President. His or her duties include supporting Account Support Representatives, Backup Support Representatives, Project Managers, Developers, and other members of the MCCi team.

Account Support Representative:

The MCCi account support representatives work as a dynamic team of support professionals who provide level 3 application support for applications provided and supported by MCCi. Reporting to the MCCi IT Director and/or MCCi Support Manager, they are responsible for the timely submission of all deliverables. Their duties include:

- Dedicating 100 percent of time to the support of existing MCCi clients
- Conducting all root-cause analysis and bug fix isolation and resolution activities, and associated documentation for the individual tasks, as assigned by the MCCi technology director and/or support manager.
- Acting as a point of contact for all application issues (software errors and related questions).
- For enhancements, determining the potential high-level effort for all changes, and based on that, either passing it on to a member of MCCi's Managed Services team if it is not a technical support related issue, or completing it themselves if possible. All bugs/software errors are addressed by level 3 support.
- Identifying all tasks associated with each support request and deriving estimates for the completion of each task.
- Responsibility for responding to and updating tickets.
- Assitance in testing to resolve application problems.
- Providing knowledge transfer to backup support specialist when needed.
- Preparing weekly and monthly status reports for pending support tickets when requested.

Backup Support Representative:

The MCCi backup support specialists work as a dynamic team of support professionals who provide level 3 application support for applications provided and supported by MCCi. Reporting to the MCCi IT Director, they are responsible for the timely submission of all deliverables and typically have other higher level job duties such as project management or development. Their duties include:

- Acting in the capacity of an Account Support Representative when there are additional capacity or escalation needs.