QuickStart for SMB Services Programs

The QuickStart for Small and Medium Business (SMB) services programs are lower-cost, pre-defined service packages covering server installation, the configuration of a few devices, and deployment of a few print or capture workflows.

QUICKSTART FOR SMB SERVICES OVERVIEW

Sized Right
The QuickStart for SMB services programs are packaged services that are easy to order, don’t require a statement of work and meet the basic document capture and print management needs of smaller customers. Designed for environments with low complexity, QuickStart for SMB is the perfect cost-effective way to deploy Kofax ControlSuite or individual modules of AutoStore, Equitrac, and Output Manager to capture documents, manage print output, control costs and increase security.

QuickStart for SMB service engagements can quickly be ordered from the price list without a service estimate or statement of work. Moreover, customers who use QuickStart for SMB services to install just AutoStore, Equitrac, or Output Manager will be ready to move to the full ControlSuite platform later as business needs grow.

Flexible Delivery
QuickStart for SMB engagements are delivered remotely and quickly to maximize convenience and minimize disruption to your business.

Key Benefits
- Simplified ordering
- Limited scope covering common deliverables
- Cost effective
- Kofax services best practices

Project Delivery Constraints
- Services hours are delivered remotely and consecutively Monday through Friday from 9 AM to 6 PM, locally in the US, EMEA and APAC regions
- Feature enablement requires valid end user license for the software in question

How to Order
Ordering a QuickStart for SMB services engagement is fast and easy. First, match the business requirements with the deliverables defined for the packages in the following pages. Next, request a quote from your Kofax reseller, place your order, and Kofax Professional Services will contact you to schedule your engagement. It’s that easy!

Importantly, by ordering using any of the SKUs in this document, the purchaser is acknowledging that such a program is provided pursuant and subject to the executed agreement with Kofax.

To learn more about QuickStart for SMB, please visit us at www.kofax.com/imagingprofessionalservices
Kofax ControlSuite Quickstart for SMB - Basic

PROGRAM SCOPE AND DEFINITION

This services package includes common workflows to capture documents and content from MFPs and desktops and includes MFP access control and print management.

Key Features
- Document and content capture from MFPs and desktops
- Basic workflows for routing documents to common locations such as email, SharePoint or file storage
- Image clean-up and conversion to searchable PDF
- Document indexing, naming, and routing
- MFP access control with card authentication
- Print management with Follow You Print

Program Deliverables

<table>
<thead>
<tr>
<th>Program name</th>
<th>ControlSuite QuickStart for SMB - Basic</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKU Number</td>
<td>01CSS004S1MO</td>
</tr>
<tr>
<td>Services Hours</td>
<td>16</td>
</tr>
</tbody>
</table>
| Deliverables                  | Installation and configuration of Equitrac or Output Manager, AutoStore, and supporting ControlSuite software on 1 server
|                               | Conduct test activities                 |
|                               | Configuration of 3 MFPs or network printers that includes:
|                               | - Device access restriction and card authentication
|                               | - Print, copy and scan tracking         |
|                               | 1 Secure printing workflow (Follow You Print) |
|                               | 1 Document capture workflow routing to folder, email, or SharePoint |
|                               | 1 hour admin knowledge transfer session  |
| Summary documentation         | Document capture source can be MFP or WebCapture desktop |

Out of Scope
- High availability or load balancing
- Scripting and custom code
- Mainframe host print
- Multi-server installation
- Training
- MFP features dependent upon device model
- Device models and firmware versions must be the same and compatible with Kofax products per the published supported device list here: http://www.kofax.com/imagingSupportedDevices

ControlSuite Project Constraints
- Capture workflows are limited to the features listed above the table under “Deliverables”
- Equitrac or Output Manager must be used for both authentication and print
- All servers and devices must meet the minimum specifications found in the product installation guide
- Software installation and configuration for products other than Kofax Software are out of scope.
- Kofax Professional Services provides a site survey document that must be completed accurately and returned to Kofax prior to the start of the engagement.
- Remote access to servers must be provided.
- All Kofax software must be downloaded prior to the start of the engagement.
- Services are limited to new installations - migrations, upgrades, or reconfiguration are out of scope.

Why Kofax Professional Services?

With years of industry experience servicing global customers, the Kofax Professional Services team is the ideal resource to perform the installation of Kofax solutions. Nobody understands Kofax software like we do. Our experience integrating the largest supported range of print and capture devices in the industry, as well as our capture and print domain experience, makes us the best resource for projects of all sizes. Our customers benefit from Kofax Professional Services’ direct access to Kofax’s world-class technical support and product engineering groups, and our proven services engagement methodology ensures the right level of attention for even small engagements deployed with QuickStart for SMB services.
**Kofax ControlSuite Quickstart for SMB - Standard**

**Program Scope and Definition**

This services package includes common workflows to capture documents and content from MFPs and desktops and includes MFP access control and print management.

**Key Features**
- Document and content capture from MFPs and desktops
- Basic workflows for routing documents to common locations such as email, SharePoint, or file storage
- Image clean-up and conversion to searchable PDF
- Document indexing, naming, and routing
- MFP access control with card authentication
- Print management with Follow You Print
- Mobile print
- Mobile capture

**Program Deliverables**

<table>
<thead>
<tr>
<th>Program name</th>
<th>ControlSuite QuickStart for SMB - Standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKU Number</td>
<td>01CSS005S1M0</td>
</tr>
<tr>
<td>Services Hours</td>
<td>24</td>
</tr>
<tr>
<td>Deliverables</td>
<td>- Installation and configuration of Equitrac or Output Manager, AutoStore, and supporting ControlSuite software on 1 server</td>
</tr>
<tr>
<td></td>
<td>- Conduct test activities</td>
</tr>
</tbody>
</table>
|                               | - Configuration of 3 MFPs or network printers that includes:
|                               |   - Device access restriction and card authentication  |
|                               |   - Print, copy and scan tracking            |
|                               |   - 1 Secure printing workflow (Follow You Print) |
|                               |   - 1 Document capture workflow routing to folder, email, or SharePoint |
|                               |   - 1 Mobile print workflow                  |
|                               |   - 1 hour admin knowledge transfer session  |
|                               |   - Summary documentation                    |
|                               | Document capture source can be MFP, WebCapture desktop or mobile |

**Out of Scope**
- High availability or load balancing
- Scripting and custom code
- Mainframe host print
- Multi-server installation
- Training

**ControlSuite Project Constraints**
- Capture workflows are limited to the features listed above the table under “Deliverables”
- Equitrac or Output Manager must be used for both authentication and print
- All servers and devices must meet the minimum specifications found in the product installation guide
- Software installation and configuration for products other than Kofax Software are out of scope.
- Kofax Professional Services provides a site survey document that must be completed accurately and returned to Kofax prior to the start of the engagement.
- Remote access to servers must be provided.
- All Kofax software must be downloaded prior to the start of the engagement.
- Services are limited to new installations – migrations, upgrades, or reconfiguration are out of scope.
- MFP features dependent upon device model
- Device models and firmware versions must be the same and compatible with Kofax products per the published supported device list here: http://www.kofax.com/imagingsupporteddevices

**About Kofax**

Kofax software enables organizations to Work Like Tomorrow™—today. Kofax’s Intelligent Automation software platform helps organizations transform information-intensive business processes, reduce manual work and errors, minimize costs, and improve customer engagement. We combine RPA, cognitive capture, process orchestration, mobility and engagement, and analytics to ease implementations and deliver dramatic results that mitigate compliance risk and increase competitiveness, growth and profitability. Kofax provides a rapid return on investment for over 20,000 customers in financial services, insurance, government, healthcare, supply chain, business process outsourcing and other markets. Kofax delivers its software and solutions through its direct sales and services organization and more than 650 indirect channel partners and integrators in more than 60 countries throughout the Americas, EMEA and Asia Pacific. For more information, visit kofax.com.
Kofax ControlSuite Quickstart for SMB - Advanced

**PROGRAM SCOPE AND DEFINITION**

This services package includes common workflows to capture documents and content from MFPs, desktops, or mobile and includes MFP access control and print management as well as mobile print. Additionally, it allows for document workflows between all ControlSuite components.

### Key Features

- Document and content capture from MFPs and desktops
- Basic workflows for routing documents to common locations such as email, SharePoint or file storage
- Image clean-up and conversion to searchable PDF
- Document indexing, naming, and routing
- MFP access control with card authentication
- Print management with Follow You Print
- Mobile print
- Mobile capture
- Document workflows between ControlSuite components
- Multi-server deployment
- Mainframe print

### Program Deliverables

<table>
<thead>
<tr>
<th>Program name</th>
<th>ControlSuite QuickStart for SMB - Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKU Number</td>
<td>01CSS006S1M0</td>
</tr>
<tr>
<td>Services Hours</td>
<td>40</td>
</tr>
</tbody>
</table>

### Deliverables

- Installation and configuration of Equitrac or Output Manager, AutoStore, and supporting ControlSuite software on up to 2 servers
- Conduct test activities
- Configuration of 5 MFPs or network printers that includes:
  - Device access restriction and card authentication
  - Print, copy and scan tracking
  - 1 Secure printing workflow (Follow You Print)
  - 1 Document capture workflow routing to folder, email, or SharePoint
  - 1 Mobile print workflow
  - 1 hour admin knowledge transfer session
  - Summary documentation
  - Cross-product workflows
  - Mainframe print

Document capture source can be MFP, WebCapture desktop or mobile. Mainframe print excludes: Xerox LCDS/Metacode, AFPDS, mixed mode data, IPDS data, NJE. Mainframe print data must: Be line data with carriage control or in a modern PDL (PCL, PS) and be sent via LPD or socket.

### Out of Scope

- High availability or load balancing
- Scripting and custom code
- Installation
- Training

### ControlSuite Project Constraints

- Capture workflows are limited to the features listed above the table under “Deliverables”
- Equitrac or Output Manager must be used for both authentication and print
- All servers and devices must meet the minimum specifications found in the product installation guide.
- Software installation and configuration for products other than Kofax Software are out of scope.
- Kofax Professional Services provides a site survey document that must be completed accurately and returned to Kofax prior to the start of the engagement.
- Remote access to servers must be provided.
- All Kofax software must be downloaded prior to the start of the engagement.
- Services are limited to new installations - migrations, upgrades, or reconfiguration are out of scope.
- MFP features dependent upon device model
- Device models and firmware versions must be the same and compatible with Kofax products per the published supported device list here: http://www.kofax.com/imaging/supporteddevices