



## ABOUT FILEHOLD

FileHold document management and records management software is an off-the-shelf solution that ships pre-configured with user roles and an intuitive and friendly file structure that mimics the physical filing hierarchy of Cabinet / Drawer / Folders. The software installation is fast and easy compared to "platform" based products that can require consultation and IT resources often measured in weeks and months.

To keep costs low, all installation and training packages are delivered to customers using safe and secure remote web based tools. FileHold offers customers the ability to purchase as much training as they require. The FileHold sales team will present the following options at the time of purchase but these can be modified to meet specific customer needs. All options include the FileHold "Fixed Fee Installation Guarantee".

## FileHold Training and Implementation Packages



FileHold has three levels of Training and Implementation packages to choose from:

- Bronze
- Silver
- Gold



### Bronze Level Implementation Package

The Bronze level implementation package is the most frequently purchased for implementations where the customer has relatively strong IT support. This is for customers who want to be self sufficient in their implementation and purchase only the technical support needed to install and get started.

The Bronze package expects the customer to use the FileHold training materials and video tours to gain a detailed understanding of the software. Bronze level assumes a "train the trainer" approach for internal deployment. The package consists of:

- Server Preparation. The customer prepares the server by following an easy to follow but detailed server preparation guide provided by FileHold.
- FileHold Software Installation. When the server

is ready the document management software is remotely installed, tested and basic configuration is done. This session will include a meeting to discuss the training plan purchased and set priorities - 2 hours.

- Training on IT and Library Administration including user rights configuration, document schemas and metadata structuring - 2 hours.
- Follow up training session on file structure and "best practices" in document management (how to set up and configure your library) - 2 hours.
- Introduction to document scanning and imaging. An overview of the included scanning software with assistance in basic set up - 2 hours.



## Silver Level Implementation Package

The Silver level implementation package is for customers who want extra assistance in all aspects of their implementation but especially in advanced document scanning and imaging. This package expects the customer to review the FileHold training materials and video tours and assumes a "train the trainer" approach for internal deployment. The package consists of:

- Server analyses. FileHold will conduct a preparation inspection to provide analyses and guidance on preparing the server - 1 hour.
  - Server preparation. FileHold will support the customer in installing the required Microsoft components in preparation for the install - 1 hour.
  - FileHold software installation. The software is installed remotely, tested, and basic configuration is done. This session will include a meeting to discuss the training plan purchased and set priorities - 2 hours
- Training on System Administration and Library Administration including user rights configuration, document schemas and metadata structuring - 2 hours.
  - Initial training session on "best practices" and file structure. This aids how to plan and configure your library - 2 hours.
  - Second training session that reviews your library configuration and settings - 2 hours.
  - Introduction to document scanning and imaging. An overview of the included scanning software with assistance in basic set up - 1 hour.
  - Advanced scanning and imaging set up and support including assistance creating bar code separator sheets and auto filing processes - 2 sessions X 2 hours each.



## Gold Level Implementation Package

Gold level implementation package is for customers who want extra assistance in all aspects of their implementation including advanced document scanning and imaging. The Gold package includes everything that comes with the Silver package but also includes end user training for internal deployment. The package consists of:

- Server analyses. FileHold will conduct a preparation inspection to provide analyses and guidance on preparing the server - 1 hour.
  - Server preparation. FileHold will support the customer in installing the required Microsoft components in preparation for the install - 1 hour.
  - FileHold software installation. The software is installed remotely, tested, and basic configuration is done. This session will include a meeting to discuss the training plan purchased and set priorities - 2 hours
- Training on System Administration and Library Administration including user rights configuration, document schemas and metadata structuring - 2 hours.
  - Initial training session on "best practices" and file structure. This aids how to plan and configure your library - 2 hours.
  - Second training session that reviews your library configuration and settings - 2 hours.
  - Introduction to document scanning and imaging. An overview of the included scanning software with assistance in basic set up - 1 hour.
  - Advanced scanning and imaging set up and support including assistance creating bar code separator sheets and auto filing processes - 2 sessions X 2 hours each.
  - End user training in either a 1 on 1 or group environment. This package includes up to 10 hours of end user training in blocks agreed to by the customer.

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