



## **Capabilities Information**

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## About the Knowledgeone Corporation

Knowledgeone Corporation (K1Corp) is a privately owned company with operations in Australasia, the United Kingdom, the USA and Canada and thousands of customers all around the world.

K1Corp was formed in 1984 (previously known as the GMB Group) by Frank McKenna, the current CEO and major shareholder and it has been designing, building, selling and supporting innovative information management solutions for over 29 years. It has a stable and proven management team and most senior managers have been with K1Corp for over ten years. It has an enviable reputation in the marketplace for innovation and product robustness.

The first RecFind was released in June 1986. It has been completely redesigned and rewritten eight times in the intervening years to protect our customers' investment in our products.

RecFind 6 is a fully-featured, fully-integrated Information Management Solution incorporating document management, records management, imaging, workflow and all required functionality. It is also a generic application solution, able to run multiple applications concurrently. It has been designed around the .NET 2010 smart-client paradigm; a rich Windows interface that can be run both on the LAN and over the Internet. The latest release also supports a browser-independent and operating system independent web-client that can be utilized as an alternative to the standard smart-client.

RecFind 6 can also be described as enterprise knowledge management solution or an enterprise information management solution. RecFind 6 is also multilingual, able to support any language including Asian languages like Cantonese and Mandarin and European languages Like French, German and Spanish.

K1Corp provides a full range of services to support its products and customers including support, consultancy, training, systems integration and project management.

## Why did we develop RecFind 6, the Button, GEM and RecCapture?

To date, the market for information management software solutions and Electronic Document and Records Management Solutions (EDRMS) has been characterized by high cost, complexity, extended and costly roll-outs and an ongoing maintenance and support nightmare. The software has also been complex and difficult to use as well as end-user intrusive and inflexible. Consequently, the much heralded revolution has never happened except for small pockets where long suffering users and IT professional persevere because they have to.

Organizations have not experienced the productivity gains and cost savings promised, in fact quite the opposite. The market is tired of the current paradigm and does not believe it can be successful. There is a mountain of evidence to support this belief.

We have specifically designed and engineered RecFind 6, the Button, GEM and RecCapture to address all of the issues that the Enterprise Content Management industry complains about. That is, we have collected all of the common objections and addressed each one in our unique solutions. The end result is a .NET 2010, Windows compliant and robust and scalable enterprise knowledge management solution that capitalizes on either a fast to roll out, easy to use client-centric solution (the Button) or our (even faster to roll out) server-centric, rules driven and fully automatic model (GEM & RecCapture).

For the first time ever our customers can quickly roll out a complete application solution that actually increases the productivity of the majority of staff by simply not requiring them to do anything other than search. All electronic documents, images and emails are automatically captured, analyzed, classified and stored without end user involvement. The RecFind 6 client is a 'smart-client' that can be deployed as an MSI removing the need for high maintenance software installations on each user's workstation and saving most large organizations hundreds of

thousands of dollars each and every year and releasing thousands of man hours of valuable IT specialist time. Alternatively, the web client can be deployed with a zero footprint.

Similarly, the market is tired of having to buy and integrate multiple products to meet common business objectives. For example, most large corporates and government agencies run more than 30 different software applications across the enterprise. The battle to maintain both compatibility and communications (i.e., exchange data) is never ending, difficult and expensive both in direct and indirect costs. The Corporate world is tired of this paradigm and is aggressively looking for a new solution. It tried ERP and that generally failed because of huge costs and huge ongoing modification and maintenance fees.

With RecFind 6, the Button and GEM and RecCapture we have collected all the known objections and addressed each one in order to bring a solution to market that will immediately benefit both government and corporate clients because it is what they have been crying out for.

### ***Client-Centric versus Server-Centric***

In a client-centric model the end user performs all of the analysis, capture and classifications work. In a server-centric model all of the analysis, capture and classification work is handled by a rules-engine that connects directly to your email server and shared drives using multiple Agents instantly capturing all new and modified electronic documents.

RecFind 6 plus the Button is our client-centric offering. RecFind 6 plus GEM and RecCapture is our server-centric offering. Some customers combine both for a 'hybrid' model.

## **What are the advantages of dealing with Knowledgeone**

What is K1Corp's edge? What is it that we do that others don't? What is it about the way we do things that makes us not only different but better? What strengths, based on real world experience, do we bring to the game? Why are our products better? Why are our products more likely to be selected? Why will a customer buy from us next time around, (and the time after that and the time after that)? Why should a customer buy from K1Corp in lieu of other vendors?

Twenty-nine years' experience designing, building, selling and supporting our 'own' (we design and develop all of our products in-house) software applications (in the USA, Canada, the UK, Australia and New Zealand) has taught us a great deal about what works and what doesn't work.

We are able to look back on those twenty-nine years and retain those things that work and reject those things that don't. We know what turns the customers on and we know what turns them off.

In K1Corp, we only implement those practices and methodologies that 'turn the customer on'.

It may sound simplistic but we believe that customers want:

- Products that are keenly and competitively priced.
- A sensible, flexible and logical pricing model.
- Scalable, robust products that are easy to install and rollout and that just work day in and day out, week after week, month after month, year after year.
- Someone to talk to about anything, someone who is always available by phone or email.
- An easy and quick way to make a support call and to have that same support call acknowledged and handled in the most expeditious manner possible.
- A regular (but not invasive) stream of news and updates about the products and services.
- A way to easily and cost effectively extend the product.
- A way to easily and cost effectively integrate the product with other products.
- A partnership with the vendor instead of the normal adversarial vendor/client relationship.
- The ear of senior management when required.

- A way to influence the future direction of the product.
- A guarantee of 100% upwards compatibility with every new release or version.
- New releases and updates that are easy to install; especially 'single-step' installation processes.
- Products that are 100% compatible with the 'standard' Windows operating systems.
- Products which are either 'no-cost' or 'low-cost' to maintain on the desktop.
- Products that always perform at the highest level producing the lowest response times and the lowest system loadings.
- A vendor that is easy to do business with and flexible in all things; resulting in a perception of personalized service. A vendor that always seems to find the time to address and respond to the unique needs of a customer.
- A vendor that always delivers what it promises.
- A vendor that will go out of its way to support a customer in times of unusual need and emergency.
- A web site that is easy to navigate and informative plus easy to find email addresses of all required functions (e.g., support, sales, training, etc.) and senior executives.
- An up front and highly visibly way to register a complaint about a product or service and the assurance that each and every complaint will be read, investigated and responded to in the most expeditious manner possible.

In short, we offer what most vendors do not do. We present a unique face to the customer. That face is of a business that wants its business, that is prepared to compete for that business, that is easy to do business with and that is flexible in its business model; addressing the unique needs of each and every customer. Our objective is to develop a mutually beneficial partnership with each customer and to avoid the old client/vendor adversarial relationship.

Our competitive edge is simply the combination of our unique business paradigm and our unique, new 'genre', products like RecFind 6, the Button and GEM and RecCapture.

## Proposed Solutions

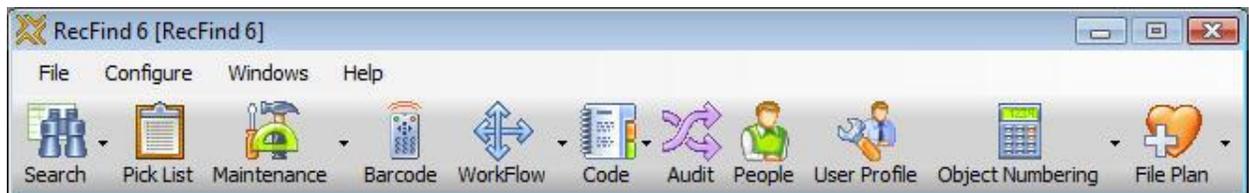
Our proposal is for the supply and configuration of our Enterprise Content Management Solution, RecFind 6.

### ***Products Proposed***

<input checked="" type="checkbox"/>	RecFind 6 (includes Xchange & the DRM)
<input checked="" type="checkbox"/>	RecFind 6 Button
<input checked="" type="checkbox"/>	GEM
<input checked="" type="checkbox"/>	RecCapture
<input checked="" type="checkbox"/>	HSSM
<input checked="" type="checkbox"/>	Mini-API
<input checked="" type="checkbox"/>	Web-Client component
<input checked="" type="checkbox"/>	SharePoint Integration
<input checked="" type="checkbox"/>	RecFind 6 SDK

### About RecFind 6

RecFind 6 is an easy to use information management solution for small and large organizations needing to retrieve and manage corporate information, manage physical records, electronic documents and emails and apply workflow to business processes. With a rich Windows and easy to use interface (below) it includes all the features you'll ever need for imaging and scanning (plus OCRing into an indexable PDF), capturing electronic, producing standard and customized reports, business process and workflow, retention schedules, importing and exporting, integration, barcode reading, offsite records storage support, automatic versioning, check-in and check-out, tracking, security and more.



RecFind 6 provides a single software system that handles multiple applications 'out-of-the-box' and one which can also be extended by the customer or systems integrator at low cost (in most cases without programming) without impairing its ability to continue to receive product updates from K1Corp. That is, despite extensive customization it remains a 'standard' product.

Built on the latest 'smart-client' .NET 2010 technology and seamlessly integrated with your email client (Exchange, Notes and GroupWise) and MS Office, RecFind 6 is a robust system that gives your organization improved search capabilities and efficient day-to-day document processing.

With RecFind 6 you can:

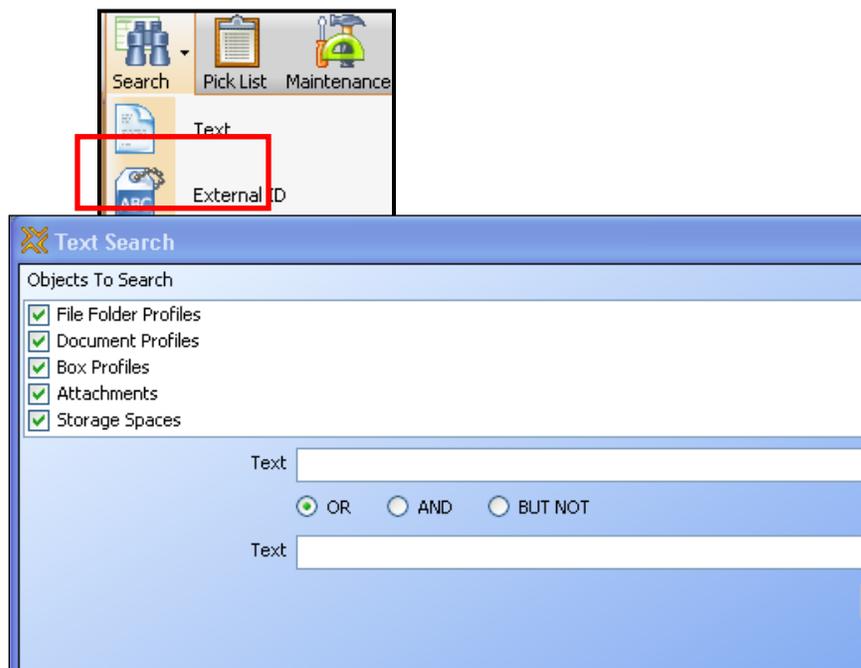
- Quickly retrieve your corporate information and records
- Scan and capture documents into searchable PDF's
- Effortlessly produce customized reports
- Streamline day-to-day business processes and workflow

- Utilize comprehensive barcode reading support
- Easily implement retention schedules
- Take advantage of our cost effective concurrent user model, saving you up to four times the amount on named or seat licences

RecFind 6 can be 'integrated' to any other application in a variety of ways - either through the use of Xchange, our standard integration engine, the RecFind 6 Button, the SharePoint Integration Module, the Mini-API (a way to 'image-enable' any other application and allow it to access the documents stored in RecFind 6) or the RecFind 6 SDK.

In summary, RecFind 6 allows you to:

- Store and manage all information within a single-repository
- Emulate the real world of paper on your computer - create and track file folders, documents and boxes from creation to archive
- Register electronic documents in the RecFind database of any file type e.g., MS Word, MS Excel, MS PowerPoint, Adobe PDF, many Graphics formats, Windows sound files and many more
- Manage boxes and space centres with disposal/retention schedules
- Search for paper documents, images, electronic documents and emails within the RecFind 6 database. You can run a full text search on any attached document (e.g., Word, Excel, PowerPoint, MSG, etc.)



- Allocate, monitor and manage work through the RecFind workflow module.
- Manage all incoming and outgoing correspondence; create business triggers and alerting systems.
- Scan, store, print and redisplay images, including multi-paged scanned images.
- Dynamically add fields, screens and tables without programming.

- Provide "view only" access to some users, while providing other users with full access to the record.
- Enter a complete classification system in the form of Keywords, Descriptors, Related Terms, Narrower Terms, Broader Terms, Forbidden Terms, and Scope Notes etc.
- Log all transactions including views and Administrator transactions. RecFind offers a complete Audit Trail reporting program allowing reports to be generated on who did what and when.
- Customize the user interface to a highly personalized look and feel (system wide or user by user basis) with colours and sounds.
- Design custom reports and save these report formats for regular use through the integration of Active Reports.
- Print a wide range of label formats for files, boxes, locations and Action Officers using the in-built module or utilize third party colour label printing software.
- Enter relevant key information and data via a barcode reader. In addition, RecFind supports the use of a portable barcode reader to more effectively track files and documents.
- Manage corporate assets; in fact manage a range of generic applications such as Supplier Contract Management, HR Management, Complaint Management, Marketing-Media Library Management, Volunteer Management, Sponsorship Management, Customer or Client Relationship Management, just to name few.

[http://www.knowledgeonecorp.com/products/recfind\\_6.htm](http://www.knowledgeonecorp.com/products/recfind_6.htm)

### **RecFind 6 Web Client**

Whereas the standard RecFind 6 smart-client can run across your LAN, WAN, Intranet or the Internet it does require a Windows PC and the .NET Framework to be installed. For most customers this is not an issue as Windows is the standard workstation operating environment.

However, we also offer a web-client that is relatively operating system and browser independent. That is, it will run on platforms other than Windows (e.g., Apple or Linux) and does not require the .NET Framework. This RecFind 6 web-client runs in a browser (e.g., IE and Firefox) and does not require any software to be loaded or maintained on the workstation.

The smart-client and web-client software can be mixed in any installation, with for example, head office staff using the rich, Windows smart-client and remote or mobile staff using the browser-based web-client.

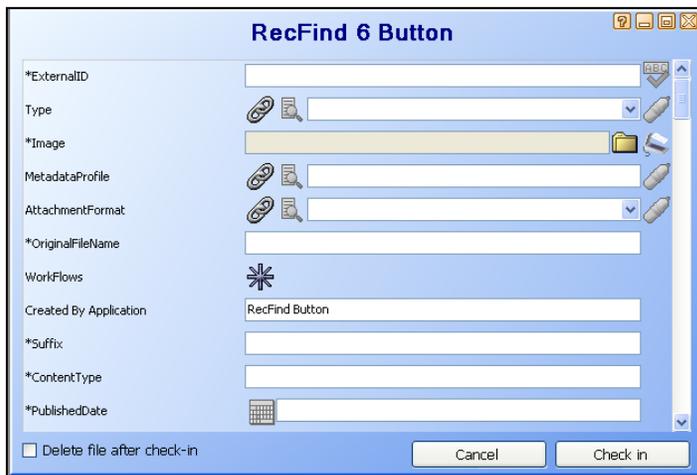
We have also designed the web-client using advanced tools like Ajax so that it 'looks-and-feels' almost the same as the smart-client. This was done so staff could move seamlessly from one client to the other without the need for retraining.

[http://www.knowledgeonecorp.com/products/recfind\\_6\\_webclient.htm](http://www.knowledgeonecorp.com/products/recfind_6_webclient.htm)

### **About RecFind 6 Button**

The RecFind-Button is a simple and easy-to-use electronic document capture tool.

The Button 'sits-on' your desktop and within your Microsoft Office applications such as Word, Outlook and Excel. It allows you to quickly and easily capture electronic documents, then store and index your documents into the RecFind 6 database.



The RecFind 6 Button allows you to either create document profiles (Metadata) or search for existing document profiles.

It also includes the ability to 'Check-In' and 'Check-Out' electronic documents.

And finally, it also allows you scan in and OCR paper documents saving them in RecFind 6 as searchable PDFs.

All RecFind 6 security measures still apply when using the RecFind-Button.

The RecFind-Button supports the following applications:

- Microsoft Word
- Word Perfect
- Microsoft Excel
- Outlook
- Lotus Notes
- GroupWise

[http://www.knowledgeonecorp.com/products/recfind\\_6\\_button.htm](http://www.knowledgeonecorp.com/products/recfind_6_button.htm)

## About GEM

GEM is Knowledgeone Corporation's fully automatic, rules-driven, server-centric email Management System. GEM connects directly to your email server (Exchange, GroupWise or Domino) and automatically captures, analyzes, classifies, stores and manages your corporate emails and attachments.

GEM is unique because it takes a copy of all emails (internal and external) at the server before the user sees them (meaning nothing is ever lost) and it is fully automatic and highly configurable (Rules-driven).

Any employee (subject to their security level) can easily search for and find any email stored in RecFind 6 using the powerful search module

Retention and Workflow can be automatically allocated to selected emails as soon as they are received.

In summary, GEM allows you to:

- Easily track, classify, store, and manage emails enterprise-wide
- Meet all email compliance standards fully automatically
- Manage your email, electronic and paper documents in one system
- Find any email, enterprise-wide, within seconds
- Secure emails in a single repository
- Shorten email server backups
- Perform full text searches not only on the text of the email but on the text of all attachments
- Capture inbound as well as outbound emails (Internal and External)

[http://www.knowledgeonecorp.com/products/recfind\\_6\\_gem.htm](http://www.knowledgeonecorp.com/products/recfind_6_gem.htm)

## About RecCapture

RecCapture is Knowledgeone Corporation's fully automatic, rules-driven, server-centric Electronic Document Management System.

RecCapture automatically captures, analyzes, indexes and versions every electronic document your staff create without involving additional work for the majority of your staff.

RecCapture includes both a sophisticated security system and a powerful search function that provides instant secure access to any stored document. It is also a system where no one has the ability to delete or modify key documents.

In summary, RecCapture allows you to:

- Automatically capture, analyze, index and version every electronic document your staff create enterprise-wide
- Meet all compliance standards fully automatically
- Continually scan specific directories and sub directories of your shared drives for new and updated electronic documents
- Determine what to do with each and every electronic document you capture
- Secure electronic documents in a single repository
- Instantly access your corporate data from anywhere in the world via the RecFind 6 smart-client

[http://www.knowledgeonecorp.com/products/recfind\\_6\\_reccapture.htm](http://www.knowledgeonecorp.com/products/recfind_6_reccapture.htm)

## About HSSM

The RecFind High Speed Scanning Module (HSSM) was designed to provide the easiest and fastest way to batch scan large numbers of paper documents and automatically index and store them in the RecFind 6 relational database.

The HSSM is made up of two modules:

1. DocScan is the product that drives the scanner, reads the barcode on the first page of multi-page documents and then organizes the scanned pages into multi-page TIFF files for processing by RecScan. DocScan v3.0 for Knowledgeone is a .NET application with significantly improved functionality and performance. DocScan 3.0 is able to scan color documents and to merge and split scanned images. It can also OCR and convert to industry standard PDF format.

2. RecScan captures any document type and stores and indexes them within the RecFind 6 relational database. It is typically used to capture all the images created by DocScan.

In summary, the HSSM allows you to:

- Handle high volumes of scanning with minimal operator intervention.
- Scan and store documents in the RecFind 6 relational database using DocScan and RecScan.
- Scan both color and monochrome documents multi-page documents.
- Merge and split scanned images.
- Scan existing directories of files (previously captured by some other system) and automatically capture, index and store all file types using RecScan.
- Assign security levels for attachments and newly created document profiles.

[http://www.knowledgeonecorp.com/products/recfind\\_6\\_hssm.htm](http://www.knowledgeonecorp.com/products/recfind_6_hssm.htm)

## About the Mini API

The RecFind 6 Mini-API creates links from an existing application to any object stored within RecFind's document repository.

Any 'object' means any file folder profile, any document profile, any box profile and any electronic object or image stored in RecFind 6. It allows other applications to talk directly to RecFind 6 and request RecFind to expose (i.e., display for viewing in the browser window) any object in RecFind.

It is a way to 'image-enable' any other application using RecFind to capture and store all required electronic documents and images. It is also a way to access and view the Metadata of physical documents/containers such as paper, file folders and archive boxes where that Metadata is stored in RecFind.

[http://www.knowledgeonecorp.com/products/recfind\\_6\\_miniapi.htm](http://www.knowledgeonecorp.com/products/recfind_6_miniapi.htm)

## About SharePoint Integration

We have a number of standard modules (e.g., the Mini-API and the SharePoint Integration Module) to make it as easy as possible to integrate RecFind 6 to your SharePoint 2010 system. However as there is no such thing as a 'standard' SharePoint integration (each customer wants it done differently) please talk to us about your specific needs and we will then propose the most appropriate tools and services to accomplish the integration.

[http://www.knowledgeonecorp.com/products/recfind\\_6\\_sharepoint\\_integration.htm](http://www.knowledgeonecorp.com/products/recfind_6_sharepoint_integration.htm)

## About the RecFind 6 API/SDK

Knowledgeone Corporation now has a Web Services API. The API is a new product that will open the door to new ways of RecFind 6 integration. It has an array of methods that allow you to perform such operations as adding, modifying, deleting records, uploading and downloading electronic documents, retrieving lists of records using searches, and more - all while conforming to RecFind 6's advanced security system.

With this functionality available, you will be able to:

1. Easily integrate with existing systems and pass data between them and RecFind 6.
2. Change or enhance existing products with different user interfaces that suit your organization.
3. Design third party applications to extend and support our many usages (CRM, BPM, Asset Management, HR, etc.).

Interacting with the API can be done using any modern language - .NET, java, C++, or even Apps for smart phones and tablets.

The API redefines the way you interact with RecFind 6 and gives you the potential to adapt it to your style and your needs.

[http://www.knowledgeonecorp.com/products/recfind\\_6\\_SDK.htm](http://www.knowledgeonecorp.com/products/recfind_6_SDK.htm)

## ***Licensing Model***

### **Concurrent User License**

Most Knowledgeone Corporation software products work on the basis of a concurrent user license. This means that the customer buys the right to have a finite number of people use the product at any one time. The products don't care who those people are (other than they have to have a valid user-id and password) and nor do they care which work station they work from.

If a customer has a 32 concurrent user license, RecFind 6 will continually count the number of people 'signed-on'. It will allow a maximum of 32 people to sign on at any one point in time and no more. Immediately a user signs off, a license is available for another user.

A feature of RecFind 6 is that you can set a configurable 'time-out' (e.g., 30 minutes) to optimize the concurrency to your specific needs, thus releasing it for another user. This is done in the RecFind 6 Database Registration Module (DRM) and the time-out can be easily modified by your RecFind 6 Administration manager to suit your unique needs.

The major advantages of this type of licensing over seat and person licensing are that it provides greater flexibility, fewer constraints, less maintenance and a significantly lower cost per each 'real' user. As a general rule-of-thumb you should assume that one RecFind 6 concurrent user license can easily support from four to sixteen 'real' users. The concurrent user licensing model is therefore by far the most cost effective way to license application software.

## ***Services Proposed***

- Conversion Consultancy
- Pre-implementation Consultancy
- Implementation Consultancy
- Post-Implementation Consultancy
- Onsite Technical Support
- Remote Technical Support
- Training
- Integration Consultancy

## Pre-implementation Consultancy

Knowledgeone Corporation can offer an independent assessment of your current system whether electronic, manual or a hybrid.

Knowledgeone Corporation is pleased to work with you to determine what your requirements are and what changes should be introduced.

Knowledgeone Corporation will tailor the consultancy to ensure that the best possible solution will be provided to you.

Budgets, time frames, resources plus short and long term goals are taken into consideration when determining the corrective action and strategy to be undertaken.

Knowledgeone Corporation's recommendations may include procedural, physical or technical changes and would include suggested time frames for the implementation.

These agreed changes would be outlined in a written report and supplied to you shortly after the consultancy. This report will outline any major problems found, why they are occurring, as well as practical recommendations with corrective measures.

Information will also be provided on potential issues that may arise if action is not taken.

The final report will also include a copy of the System Overview completed by the consultant as part of your final documentation. This will prove to be a valuable document as it includes useful statistics and operational information, which may be used as a reference in the future. A summary of the major concerns and issues identified by your personnel during the interviews conducted with your consultant will also be supplied.

## Implementation Consultancy

Knowledgeone Corporation's Implementation Consulting Service is usually conducted after a Pre-Implementation Consultancy. It ensures that all recommendations provided within the Pre-Implementation report are implemented accurately and efficiently within the organization.

A Knowledgeone consultant will advise and guide your staff on how they can implement these specific strategies in accordance with their needs.

Involving Knowledgeone Corporation from the commencement of the project ensures a clear and consistent understanding of any issues and when to address them, which will result in changes being correctly implemented.

A detailed report is also provided as part of the Implementation Consultancy to explain exactly how your RecFind system has been configured. This report also includes sample administrative settings such as security.

For other areas that involve procedural, physical or technical attention, Knowledgeone Corporation will advise your staff in the compilation of documentation or supervision required to implement the necessary changes. Knowledgeone Corporation consultants will also assist in the presentation of these new changes to both management and users of the new system, if required.

## Post Implementation Consultancy

Armed with the information garnered during the pre-implementation consultancy and the decisions made during the implementation consultancy we return to your site at a pre-determined time (usually plus minus six months) to review and measure progress against agreed objectives.

Post Implementation Consulting will evaluate the following important elements:

- Have the recommendations been implemented?
- Have they been implemented correctly?
- Are the recommendations effective?

- Do the recommendations address any new issues that may have arisen since their implementation?

Knowledgeone Corporation will also assess the requirement for further modification and continued improvement of your system. Special attention is given to ensuring that administration and maintenance functions are being performed on a regular basis to keep your system in optimum condition.

Upon completion of the Post Implementation review, a report may be provided (optional) that summarizes the current status of the system. Any other areas of opportunity as well as the introduction of new technologies that may further enhance the system will also be included within this report.

## **Conversion Services**

### **Overview**

It would be a rare instance when a new installation of RecFind 6 did not involve the need to capture data from existing legacy systems and/or the organization's shared drives.

To accommodate this need we offer what we call conversion consultancy and conversion services.

### **Conversion Consultancy**

The Knowledgeonecorp consultant will interview the key staff responsible for the data to be captured and converted to best determine what should be captured and what should be ignored. He will also investigate your data sources and produce a summary of all data to be captured. This report will include recommendations on how best to cull and organize the data. There is no point in importing bad or redundant data into RecFind 6.

The final part of the consultancy is directed towards mapping your old data to the RecFind 6 data model. These mapping recommendations will also be included as part of the final report.

Once the final report and recommendations have been accepted by the customer we can utilize our conversion services to get the job done.

### **Conversion Services**

This is where we actually capture your old data and convert it to the RecFind 6 data model. The way we capture data will vary depending upon the type and location of data. If your old data is in some form of database (e.g., Access, DB/2, SQL, Oracle, etc.) we would normally use our Xchange tool to capture the data. If your old data is in shared drives we may use RecCapture or RecScan or a purpose built utility to capture the data.

Our conversion services rely upon the report and recommendations provided by our conversion consultant. This clearly tells us what data to capture, how to capture it and how to map it to the RecFind 6 data model.

The conversion is an iterative process. We normally run it several times with the customer reviewing it, fine-tuning it and then finally signing off on a final run.

## **Training**

We provide a full complement of classroom training courses covering all aspects of RecFind 6 from end user training to using the DRM and Xchange. These courses can be run onsite or at regular scheduled locations. We also provide customized training where appropriate.

### **RecFind 6 User Course**

Duration: 2 days

### Overview

This practical, hands-on training course is designed for all personnel associated with the creation and management of information.

### Topics Covered

Introduction to RecFind 6, File Folder Maintenance, Document Maintenance, Imaging and Electronic records, RecFind 6 Button, Movement Tracking, Requests, Searching, Workflow Management, Pick List and Reporting.

### **RecFind 6 Administrator course**

Duration: 2 days

### Overview

This training course is designed for management and personnel who are responsible for the implementation and maintenance of the RecFind 6 Application and related company procedures.

### Topics Covered

Responsibilities of the Administrator, Logging on to the DRM, Activating the RecFind 6 Application Suite, Database backups, Integrating with Active Directory, Security, Security Groups, Adding new Users, Configuration settings, Configuring the calendar, Configuring and use of the Audit Trail, I-filters and indexing, Configuring object numbering formats, Configuring tables, Configuring fields, Changing fields being displayed on screen, Configuring data filters, Configuring business logic including Stored Procedures, Triggers and Scheduled Tasks, Configuring error messages, Configuring warning messages, Configuring Processes, Adding Codes, Configuring corporate vocabulary, Configuring record categories, Configuring file titling, Configuring archiving/retention schedules, Configuring series codes, Configuring language groups, Configuring Boolean searches

## Pricing Summary

Blank standard format

Price ex Taxes and  
Delivery

Software	
<input checked="" type="checkbox"/>	RecFind 6 – n concurrent user licenses
<input checked="" type="checkbox"/>	GEM – SME or Corporate or Enterprise version
<input checked="" type="checkbox"/>	RecCapture - SME or Corporate or Enterprise version
<input checked="" type="checkbox"/>	Button – n user licenses
<input checked="" type="checkbox"/>	HSSM – n Copies
<input checked="" type="checkbox"/>	Mini-API – 1 only required
<input checked="" type="checkbox"/>	Web-Client Component – 1 only required
<input checked="" type="checkbox"/>	SharePoint Integration – 1 only required
<input checked="" type="checkbox"/>	RecFind 6 SDK – 1 only required
<input checked="" type="checkbox"/>	Automatic Software Upgrade (ASU)
	<input checked="" type="checkbox"/> One Year ASU or
	<input type="checkbox"/> Two Year ASU or
	<input type="checkbox"/> Three Year ASU or
	<input type="checkbox"/> Four Year ASU or
	<input type="checkbox"/> Five Year ASU
<b>Sub Total Software</b>	
	Services
<input checked="" type="checkbox"/>	1-800 Incidents (Help Desk) X 10
<input checked="" type="checkbox"/>	Training
<input checked="" type="checkbox"/>	Installation
<input checked="" type="checkbox"/>	Pre-implementation Consultancy
<input checked="" type="checkbox"/>	Implementation Consultancy
<input checked="" type="checkbox"/>	Post Implementation Consultancy
<input checked="" type="checkbox"/>	Conversion Services
<input checked="" type="checkbox"/>	Project Management Services
<input checked="" type="checkbox"/>	Systems Integration Services
<b>Sub **Total Services</b>	
<b>Total Proposal Cost</b>	

**Option B: RecFind 6 Subscription Pricing\***

The K1Corp Subscription Model is low cost, low risk and scalable. It is the easiest and most flexible way for you to acquire enterprise software. It does not entail any initial capital outlay or any long-term, 'locked-in' agreement. To your benefit, it also locks in prices at the date of the initial agreement and protects you against any future price rises when extending the term or increasing licenses or adding new products.

There is no easier, safer, less risk, lower cost or more flexible way to acquire enterprise software solutions.

**\*Subscription Terms and Conditions**

1. No upfront software purchase.
2. The customer specifies the period (from 12 months up).
3. Low monthly all-inclusive fees that include maintenance, 1-800 technical support, service pack downloads and automatic shipment of software updates. No Automatic Software Upgrade (ASU) charges.
4. Prices are locked in for the duration of the agreement, even if you extend. The price guarantee is that you will never pay more per concurrent user license than you did in the initial agreement but you may pay less (because of volume discounts built into our price list).
5. The software stops working after the end of the specified period (it can be reactivated with an extension of the period) but your data is maintained and accessible by your staff in an open, relational data model under SQL Server.
6. A minimum period of twelve months.
7. Ability to cancel after 12 months with no penalties or fees.

## Order Acceptance

Please select your choices and complete the details below and scan and email to Knowledgeone Corporation on sales@knowledgeonecorp.com

Please make all purchase orders and / or cheques payable to "Knowledgeone Corporation"

Total Value of Purchase Order (ex Taxes) \$ \_\_\_\_\_

Name:.....Position:.....

Signed:..... Date: .....

Purchase Order #: ..... Purchase Order Attached: Yes No

### PAYMENT TERMS & CONDITIONS

All prices are quoted exclusive of expenses, taxes (e.g., VAT & GST) and delivery.

This proposal is valid for 30 days only. This proposal is subject to the full Knowledgeone Corporation Terms and Conditions of Sale; This proposal is Commercial In Confidence and remains the sole intellectual property of Knowledgeone Corporation. All rights and privileges are to remain the property of Knowledgeone Corporation.

#### Knowledgeone Corporation Payment Terms

Training, Consultancy, Human Services, Third Party Products: Payment in full before work commences.

Conversion Services, Software Development: 50% before work commences, 25% on first run, 25% on final delivery. Software & Maintenance: Payment in full within 14 days. Without in any way limiting Knowledgeone Corporation's right to require payment in full on the due date, Knowledgeone Corporation may charge interest on overdue accounts as follows: 45 days - 5%, 60 days - 10%, 90 days - 15%. Knowledgeone Corporation may from time to time place or adjust limits on the amount of credit to be extended to the Purchaser.

#### Training and Consultancy

Onsite consultancies are quoted at a fixed price for an estimated time frame, (travel time included). Should the consultancy exceed the time quoted, due to Knowledgeone Corporation, there will be no extra charge. However, should the consultancy exceed the time quoted, due to the customer, extra time onsite will be chargeable. Customers will be provided credit for outstanding periods of half a day (4 hrs.) or more if the consultancy is completed within the time frame. No refunds will be made for the time outstanding.

## **Other Services Available**

### **Systems Integration Services**

K1Corp offers systems integration services if Prospect or Prospect's chosen system integrator is unable or unavailable to perform the services required.

In most situations this will involve modifying the RecFind 6 Data Model and using Xchange to integrate to the selected applications.

Over the last 29 years we have completed numerous integrations with 'other' products. We consult with your key staff to define the integrations required and then utilize Xchange to build and automate the links between other products and RecFind 6.

### **Project Management Services**

K1Corp offers Project Management services if Prospect or Prospect's chosen system integrator is unable or unavailable to perform the services required.

This will usually entail assigning a trained and experienced project manager to be responsible for the successful rollout of RecFind 6.

If required, we can provide the experienced project management staff required to manage your RecFind 6 implementation and roll out through to system sign off.

### **Support**

Knowledgeone Corporation's Maintenance & Technical Support Services include:

- Automatic Software Upgrades (ASU)
- Service Packs
- 1-800 Support (Incidents)
- Free Website Support
- Onsite Support
- Desktop Streaming or Virtual 'On-site' Support
- Online Knowledgebase

#### ***Automatic Software Upgrades (ASU)***

Knowledgeone Corporation's Automatic Software Upgrade (ASU) service ensures that the customer is shipped at least one product update per annum. These updates will contain new functionality, fixes and updates to ensure compatibility with the latest releases of Microsoft, Novell, Lotus Notes and Oracle products.

As well as providing the customer with new and improved features, the ASU service also protects the customer against technological obsolescence. It protects your software investment and ensures that you are able to keep pace and stay compatible with the rapidly changing IT environment. You don't have to worry about keeping up with the latest releases from Microsoft and Oracle because we do it all for you.

Software upgrades include:

- Maintenance enhancements, to support changes in operating systems and relational databases
- Functionality enhancements, enhancing existing functionality, adding new functions and features

- Technology enhancements, to take advantages of new technology, improving product performance, reliability and scalability

### ***Service Packs***

In line with Knowledgeone Corporation's ongoing development program, we are continually developing and improving our products. Whereas we produce at least one new major feature release per year for shipment to our customers, we also produce 'mini-releases' (service packs) as part of the development process.

The Service Pack is not a new concept. It has been used by most major software vendors such as Microsoft for some years. The major difference between Knowledgeone Corporation's service packs and those of other vendors is that ours include improvements as well as bug fixes.

Our Service Packs assist us in our endeavor to provide our customers with a level of service that is second to none, by making product improvements and developments available to customers instantly and by increasing the stability of your product installation.

This "Service Pack" policy is designed to provide customers with better software and a greatly improved level of service by:

- Pre-empting a situation where a customer finds a problem and reports it to Knowledgeone Corporation
- In most cases our services packs will correct problems before you find them.
- Making product improvements available to customers immediately.
- Providing a simple update with easy to follow installation instructions.
- Providing an instant download of the Service Pack via the Internet. A problem found today can be fixed today.
- Ensuring that Knowledgeone Corporation's level of services remains far above that of our competitors.

We notify our customers about the release of new service packs via our e-mail newsletter. To subscribe to the newsletter, please contact our sales department at with the name, position, organization, phone number and e-mail address for each person to be subscribed.

For more details on K1Corp's service pack service please [click here](#).

### ***1-800 Support Incidents***

The 1-800 Support service includes maintenance support via telephone, facsimile, mail and e-mail.

Knowledgeone Corporation's objective is to provide the required maintenance support at the time of contact or as soon as practicable thereafter.

If the customer wishes to make use of Knowledgeone Corporation's 1-800 Support-Service, it must register a support incident before contacting the Help Desk.

For more details on K1Corp's help desk services please [click here](#).

### ***Free Website Support***

Customers who have a current Automatic Software Upgrade agreement can also submit non-urgent queries via the Knowledgeone Corporation web site. Most website support calls are answered within 24 hours.

For more details on free support calls via our website please [click here](#).

### ***Onsite Support***

Knowledgeone Corporation provides its customers' with on-site services. We have a number of different services which we offer:

- Data Migrations
- Software Upgrade Installation
- Application and Database Assistance
- Application Installation
- Technical Training

If you are interested in obtaining on-site services from Knowledgeone Corporation, please contact your account manager or contact us at [support@knowledgeonecorp.com](mailto:support@knowledgeonecorp.com)

For more information on onsite support services please [click here](#).

### ***DesktopStreaming Support***

Knowledgeone Corporation provides an alternative to the normal 'on-site' service called DesktopStreaming.

This service avoids the high costs and scheduling problems associated with actually putting a technical person in your office. Given that we have customers in Africa, Europe, North America and Australasia it was patently extraordinarily difficult and expensive to provide a 'technician-on-site' service to all of those locations in the time frame required by the customer in each instance (like, "Today please").

This unique service allows a Knowledgeone Corporation technician to 'take over' the operation of your workstation or server just as if he/she was actually sitting in your chair, at your site. Operationally, it is no different from having a live person on site. Scheduling can be arranged on a few hours' notice. DesktopStreaming costs \$150/hour (exclusive of taxes).

For more information on our DesktopStreaming services please [click here](#).

### ***Online Knowledgebase***

K1Corp provides an online knowledgebase to assist our customers to better utilize RecFind 6.

For more details of K1Corp's online knowledgebase please [click here](#).

## User Groups and Forum

Knowledgeone Corporation User Groups are well established around the globe with Knowledgeone Corporation's support and participation.

Most groups meet quarterly and always welcome new members.

An International User Group meeting is also held annually each September.

Knowledgeone has also set up an Internet based user Forum.

Whether you are a power user of Knowledgeone Corporation products, or a new user looking for insight from others, we invite you to get involved and get connected via the Forum. Our customers and partners have an understanding and knowledge of our products built from real-world experience and the Knowledgeone Corporation User Forum can provide a place where users can talk to one another, sharing experience and knowledge.

**Important Note:** The Forum is not an official customer support channel for Knowledgeone Corporation. If you require direct assistance please contact Knowledgeone Corporation Support directly.

For more details on User Groups please [click here](#).

For more details on our user online Forum please [click here](#).

## Customer References

Please refer to our website for recent testimonials from our customers

<http://www.knowledgeonecorp.com/company/testimonials.htm>

# Software and Hardware Prerequisites

## ***RecFind 6 Hardware & Software Prerequisites***

### **Application Server**

#### Minimal Hardware Requirements

- Intel Single CPU, dual core Processor or better
- 4GB or more of RAM
- 5GB of free hard drive space
- High-speed network card
- CD-ROM

#### Software Requirements

- Windows 2003 or 2008 Server
- Microsoft .NET Framework v3.5

### **Database Server**

#### Minimal Hardware Requirements

- Note: for smaller sites can be same server as 'Application Server'
- Intel Single CPU, dual core Processor or better
- 4GB or more of RAM
- Minimum of 10GB\* free hard drive space
- High-speed network card
- CD-ROM

#### Software Requirements

- Microsoft SQL Server 2005 or 2008 with mixed authentication & full-text indexing enabled.
- Windows 2003 or 2008 Server

### **Web Server (Optional)**

#### Minimal Hardware Requirements

- Note: for smaller sites can be same server as 'Application Server' or 'Database Server'
- Intel Single CPU, dual core Processor or later
- 4GB or more of RAM
- 5GB of free hard drive space
- High-speed network card
- CD-ROM

#### Software Requirements

- Windows 2003 or 2008 Server with IIS 6.0
- Microsoft .NET Framework v3.5

### **Workstation / Client**

#### Hardware Requirements

- Intel Single CPU, dual core Processor or better
- 2GB or more of RAM

#### Software Requirements

- Microsoft Windows XP, Vista or Windows 7
- Microsoft .NET Framework v3.5

- 200MB of free hard drive space
- High-speed network card
- CD-ROM
- Microsoft Office 2003, 2007 or 2010\*\*

## Scanner (Optional)

### Hardware Requirements

- Any TWAIN compliant scanner

### Software Requirements

- TWAIN driver

Optimum performance is achieved with additional memory (RAM), faster processors and multiple processors. Where possible, always opt for the latest technology multi-core CPUs, RAM and multiple CPUs. Both the RecFind 6 web server and the RecFind 6 database server will automatically utilize multiprocessor technology and additional RAM for improved performance.

\* The amount of required disk space depends upon the number of records you will store within the RecFind 6 SQL Server relational database. If you also store electronic documents and images (stored as Blobs in RecFind 6) then you will need to include these in your calculations. You should also opt for redundant configurations (e.g., RAID) wherever possible.

\*\*Optional. Will be required to enable spell-checking and OCR functionality.

**“People time is expensive, hardware is cheap!”**

Wherever possible upgrade the hardware configuration to facilitate improved productivity. Please spend a small amount of money once on the server rather than spending a lot of money every day on staff wasted time because of poor response times.

## Summary

Multiple CPUs are better than single CPUs, especially on the database server because SQL Server will automatically use them to improve performance.

Multiple cores are better than single cores.

Faster CPUs are better than slower CPUs.

More RAM is better, especially on the database server because SQL Server will happily use the entire RAM available to improve performance.

Multiple servers are better but RecFind 6 will happily run on a single server (serving as the application, web and database server) given that it has enough resources.

RecFind 6 will also happily run on virtual servers just as it will happily ‘share’ a database server and an instance of SQL Server.



## STANDARD TERMS & CONDITIONS

### **General**

The following terms and conditions of sale shall apply to, and form part of any contract for the supply of goods and services by Knowledgeone Corporation ABN 73 002 879 254 ("K1 Corp") to another party ("the Purchaser"). These Terms of Sale shall replace any previous Terms of Sale.

### **Offer and Acceptance**

Any quotation given by K1 Corp is not an offer to sell. An order placed by the Purchaser pursuant to a quotation is not binding on K1 Corp unless and until accepted by K1 Corp.

### **Cancellation of Orders**

Once lodged with K1 Corp, an order may not be cancelled or delivery delayed without K1 Corp's prior agreement in writing and then only on the terms incorporated in such agreement. In all cases the Purchaser shall reimburse K1 Corp for all costs associated with the work undertaken in relation to the contract and also pay K1 Corp an amount equivalent to the profits which K1 Corp would have achieved had the contract been completed. K1 Corp's calculation of such amount shall be binding on the Purchaser.

### **Delivery**

K1 Corp shall not be liable for any loss or damage (including consequential loss or damage) arising from delay in delivery or failure to deliver due to circumstances beyond its reasonable control. The Purchaser shall accept and pay for the goods or services notwithstanding late delivery. Deliveries to third parties may be arranged at the request of the Purchaser subject to acceptance by K1 Corp. Deliveries to third parties pursuant to this sub-clause shall be deemed to be delivery to the Purchaser.

### **Freight, Handling and Shipping Charges**

The Purchaser is responsible for all freight, handling and shipping charges. All such charges will be added to the Purchaser's invoice by K1 Corp.

### **Warranty**

Except for the warranties expressed in this License and the conditions and warranties implied by the Trade Practices Act 1974 and equivalent State legislation, K1 Corp makes no other warranties whether express or implied as to any matter whatsoever. All warranties, terms and conditions which are implied by any law are to the fullest extent possible hereby expressly excluded. In the event that K1 Corp may be liable for any breach of any warranty its liability shall, to the extent legally permissible, be limited to one or both of the following as determined by K1 Corp in its absolute discretion:

- (i) the correction of any faults in the goods; or
- (ii) the replacement of the goods.

In no event shall the liability of K1 Corp exceed the sum actually paid by the Purchaser for the goods during the current twelve-month period of this Agreement. K1 Corp shall in no event be liable for the following loss or damage howsoever caused and even where the possibility of such loss has been disclosed or could reasonably have been foreseen:

- (a) economic loss; and
- (b) special, indirect or consequential loss.

### ***License to Use Software***

The software is the property of K1 Corp and is protected by intellectual property laws. You may not transfer the license or the software without the express written permission of K1 Corp and, if transfer is permitted, no copies of the documentation or the software will be retained by the transferor.

### ***Payment***

The Purchaser agrees to comply with the normal trading terms of K1 Corp (which are net cash 14 days and this period is defined as 14 days from the date of delivery) or as otherwise stipulated in writing by K1 Corp. It is agreed that on the event that the Purchaser does not make payments in accordance with this clause, the credit facilities may be refused, changed or withdrawn and all monies owed by the Purchaser will become immediately payable. Without in any way limiting K1 Corp's right to require payment in full on the due date, K1 Corp may charge interest on overdue accounts as follows: 45 days - 5%, 60 days - 10%, 90 days - 15%. K1 Corp may from time to time place or adjust limits on the amount of credit to be extended to the Purchaser.

### ***Retention of Title***

The rights to use the software, and ownership of other goods supplied does not pass to the Purchaser until the invoice is paid in full to K1 Corp.

### ***Default***

In consideration of the granting of such credit facilities the Purchaser agrees that should collection and/or legal action be taken by K1 Corp for the recovery of any monies due and payable by the Purchaser to K1 Corp, the Purchaser hereby agrees to be responsible for, and to reimburse K1 Corp for all costs and legal expenses, including commissions, which may be incurred or becoming payable in any collection and/or legal action taken for recovery of monies due and owing. In this regard costs include legal costs on solicitor client basis.

### ***Fitness for Purpose***

The Purchaser agrees that it does not rely on the skill or judgment of K1 Corp in relation to the suitability of any goods or services for a particular purpose unless it has indicated that purpose in writing to K1 Corp and K1 Corp has acknowledged in writing that the goods will be fit for that purpose.

### ***Returns***

Products purchased from other suppliers on the Customers' behalf and software supplied directly by K1 Corp may not be returned without K1 Corp's prior agreement in writing and then only on terms incorporated in such agreement.

### ***Goods/Services/Sales Tax***

Unless otherwise stated, quoted prices do not include any applicable Federal, State or Local Goods, Services or Sales taxes. Any applicable taxes will be added to the invoice value.

### ***Purchaser's Responsibility***

The Purchaser undertakes to notify K1 Corp promptly in the event of any change in the trading address and/or ownership of the Purchaser and/or in the conversion of a sole trader/partnership entity into an incorporated company. The Purchaser will indemnify K1 Corp against any loss incurred by it due to any change of ownership of the Purchaser unless written advice of such change is received by K1 Corp prior to the commencement of tooling and/or production and/or delivery of the goods.

### ***Disputes***

In the event of any dispute between the parties arising out of supply of goods or services by K1 Corp to the Purchaser, either party may give written notice of the existence of such dispute to the other whereupon both parties shall attempt to resolve the dispute. Failing resolution of the dispute, either party may refer the matter to arbitration or to a court of competent jurisdiction in:

North America: The city of San Diego, California. The applicable law shall be that of the State of California, The United States of America.

Australasia: The city of Sydney, New South Wales. The applicable law shall be that of the State of New South Wales, Australia.

### ***1-800-Incident-Support and Warranty Service***

1. All K1 Corp products are delivered with a 3-month warranty from the initial purchase. This warranty period commences with the date of receipt of the software product. The services provided during the warranty period are identical to those provided under the 1-800-Incident Support agreement and are as described in paragraphs 2., 3., 4., 5., 6., and 7., below.
2. The 1-800-Support-Service includes support via telephone, facsimile, mail and e-mail where available. K1 Corp's objective is to provide the required support at the time of contact or as soon as practicable thereafter. Passive telephone support (i.e., the operator or voice mail system will record your details and you will be responded to the next working day) is available in all other hours.
3. Incident Support does not include training or application support (i.e., instruction on how to use the product). Requests for training and application support will be referred to the appropriate K1 Corp department and are chargeable services.
4. When requesting support, customers are required to supply:
  - Customer Number (Refer to Invoice)
  - Customer Name
  - Customer Address
  - Contact Name
  - Contact Phone Number/Email
  - A concise description of the problem, plus all appropriate supporting documentation including screen dumps, error message text, sample reports etc.; and PIN Number (from the Support Confirmation/Renewal letter).
5. The 1-800-Incident-Support-Service does not include onsite support. If onsite support is requested by a customer it will be charged for at the then prevailing standard rates, currently \$1,700 per day plus travel expenses.
6. K1 Corp's responsibilities are limited to the ongoing support of its application software products. K1 Corp accepts no responsibility for the installation and successful operation of operating systems (e.g., Windows 2000), database packages (e.g. SQL Server), networking operating systems or components (e.g. the LAN, WAN, ODBC, TCP/IP, etc.) or computer or networking hardware and firmware. It is the customer's responsibility to ensure that all operating systems, networks and hardware and firmware are installed correctly and operating efficiently. Nor does K1 Corp profess to have detailed knowledge or expertise in operating systems, database systems, networking components, hardware and firmware other than the basic settings required for the operation of its application software products. In the situation where the customer requests advice or opinion on the successful operation of operating systems, database systems, networking components, hardware or firmware K1 Corp may provide such advice at its discretion but accepts no responsibility whatsoever for the correctness or otherwise of such advice and the customer should at all times rely only on the advice of its own experts in these areas.
7. Support calls will not be accepted under any circumstances, unless the caller has active "incidents" or is under warranty.