



Technical Proposal Response

Document Management System

City of Cooper City

Request for Proposal Number: RFP 2024-4-CC

Due Date: August 8, 2024, 3:00 PM EST

Submitted to:



Office of the City Clerk
City of Cooper City
City Hall
9090 Southwest 50th Place
Cooper City, FL 33328

Submitted by:

Global Solutions Group, Inc.



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Offeror

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CAGE 6M9L5
DUNS 078343325
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US DoD Top-Secret Facility Clearance



CMMC 3PAO Candidate – ML3



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Woman-Owned Small Business

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Contracting Vehicles



Multiple Award Schedule
Contract # GS-35F-171AA
(Formerly Schedule 70)

Multiple Award Schedule
Contract # GS-02F-025GA
(Formerly Schedule 736)

Multiple Award Schedule
Contract # GS-03F-132DA
(Formerly Schedule 36)



Persons authorized to negotiate with the Government and sign the proposal and subsequent award on Offeror's behalf:

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Acknowledgement of Addenda, Questions and Answers, and other Modifications

NA

Submit to:



Office of the City Clerk
City of Cooper City
City Hall
9090 Southwest 50th Place
Cooper City, FL 33328

August 8, 2024

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Cooper City, FL 33328

Subject: Global Solutions Group's Response to **Request for Proposal Number: RFP 2024-4-CC** for **Document Management System.**

Dear Procurement Officer:

Global Solutions Group, Inc. (GSG) hereby presents our response to Request for Proposal Number: RFP 2024-4-CC for Document Management System for the City of Cooper City ("City").

GSG is a multifaceted technology company incorporated in the State of Michigan in 2003. We are headquartered in Oak Park, Michigan. ***We are an SBA 8(a) Certified Small Business, Certified Women Owned Small Business (WOSB), Certified Minority Business Enterprise (MBE), and Economically Disadvantaged Woman - Owned Small Business (EDWOSB).***






GSG is an ***ISO/IEC 27001:2013 Information Security Management Systems, ISO 9001:2015 Quality Management System, and ISO 20000:2018 – Service Management System Certified*** firm. Our team has the ability to consistently provide products and services that meet customer and applicable statutory and regulatory requirements.

GSG understands that the City of Cooper City ("City") is looking for software and implementation, migration, and deployment of a city-wide enterprise Document Management System ("DMS"). GSG recommends Laserfiche system which can fully support the improvement of records management, retention and indexing, workflow, document access, retrieval of documents, and more functionality. We are sure that we can fulfill all your goals including implementing a system that stores digital images quickly and effectively for later retrieval by securely defined user(s) or group access.

GSG is a Value-Added Reseller (VAR) of Laserfiche, and ***we provide Laserfiche Licenses, Installation, Maintenance and Supports services to City, State and Federal Government.*** As a Certified VAR, GSG has the requisite capability to provide Laserfiche LSAP Upgrade and Maintenance and Supports services. We have access to the latest innovations in implementation, integration, and customization practices, and our team constantly takes advantage of the opportunities to update and enhance their skill sets and knowledge.

GSG has experience working with government institutions, including transit agencies, managing implementations at the local, state, and federal levels of government. We have the expertise, experience, and proficiency to successfully maintain and update any size Laserfiche system for any type of agency or business. Our team has implemented Laserfiche systems for local, state, and federal government agencies, including individual departments, multiple departments, multiple locations, and enterprise wide. As a Certified Laserfiche VAR, all Electronic Content Management (ECM) Technicians are Laserfiche Gold or Platinum Certified. GSG is providing all type of services for Laserfiche product including:

 <p>Professional Services including Configuration, Administrative and Support Services.</p>	 <p>Warranty and Support including quick-response technical support, 24/7 online support, access to the latest hotfixes, updates and patches, access to new releases/upgrades, troubleshooting services performed during our normal business hours via telephone, email or secure remote access, break/fix for all software or hardware provided, installed, or configured by GSG and under an active support agreement.</p>	 <p>Training includes End-User Training, System Administrator, and required documentation of project.</p>
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	<p>GSG Value Add Service</p>	<p>Our team has been currently providing Document Management services in Florida at Tyndall AFB, City of Pembroke Pines, and Gainesville.</p>
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GSG brings top-notch skills, experience, equipment, personnel, and supervision to bear to deliver precise, prompt, and best value services. GSG will meet all service and personnel requirements as well as all terms and conditions included in the requirement document, with no exceptions. We agree with all terms, conditions, and provisions included in the solicitation document, and we further agree to furnish all items at the price indicated for each item.

Point of Contact Details

Name: Lisa Salvador
Title: Vice President
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(313) 333-0188 (mobile)

As Vice President of Global Solutions Group, Inc., I am fully authorized to negotiate and bind GSG during the period in which the City is evaluating proposals. You may contact me at any time.

Regards,



Lisa Salvador
Vice President

A. Title Page

RFP Number and Title	RFP 2024-4-CC, Document Management System
Date	August 8, 2024
Name of the Firm	Global Solutions Group, Inc. (GSG)
Contact Person (Including Title) Authorized to Represent the Firm	Lisa Salvador, Vice President
Telephone Number	Direct: (248) 291-5440 Mobile: (313) 333-0188
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C. Technical Proposal

C.1. Approach and Methodology To Accomplish The Scope of Work

GSG understands that the City of Cooper City (City) is looking for qualified vendors to obtain software and assistance in the implementation, migration, and deployment of a City-wide enterprise Document Management System (DMS). Based on the City's requirements, we are proposing Laserfiche as a DMS to the City. Laserfiche offers a comprehensive solution to address the City's needs for improving records management, retention, indexing, workflow, document access, and retrieval. Laserfiche has scanning and capture features, such as Laserfiche Quick Fields, enabling quick and effective digital imaging of documents, providing they are indexed and stored for easy retrieval. Role-based security and detailed audit trails provide granular access control, allowing administrators to define secure user and group access while maintaining accountability.

For archival permanency, Laserfiche supports storing documents in non-proprietary formats like PDF/A and offers import/export capabilities for seamless data migration. Advanced search functions and metadata-driven search options facilitate the retrieval of documents by date, type, or number range. Laserfiche also supports exporting documents and metadata to various formats such as PDF, Word, Excel, or CSV, enhancing data sharing and integration. Laserfiche has Document version control and check-in/check-out features to ensure document integrity by maintaining a complete version history and preventing editing conflicts. Workflow automation through Laserfiche Workflow and business process management tools streamline document-related tasks, routing documents to the appropriate personnel efficiently. Additionally, custom metadata fields and auto-indexing capabilities simplify the indexing and metadata entry processes, ensuring that documents are easily searchable and retrievable. Overall, Laserfiche provides a robust system that securely stores digital images, supports long-term archival, and offers efficient retrieval and management of records.

GSG offers a comprehensive solution for the City's records management needs, including scanning, indexing, secure access, and workflow automation. Laserfiche system supports long-term archival in formats like PDF/A and allows for advanced search and metadata-driven retrieval. It includes document export to various formats, version control, and check-in/check-out features. All parts and services conform to best practices as specified in the RFP and are included in the proposed pricing.

GSG understands the background and current DMS needs of the City. Our proposed Document Management System provides comprehensive solutions, including document imaging, management, indexing, searching, workflow automation, archiving, and retention capabilities. The system is scalable to integrate existing electronic documents and scan paper documents, improving business processes, protecting records, and enhancing their availability to the public.

GSG understands the City of Cooper City's requirements and offers Laserfiche as a solution. Laserfiche provides a Cloud-Based/SaaS Content Services Platform with 24/7 access from any device, such as Windows, Mac, Android, and iOS. It supports central digital storage of documents and records and delivers a high-performance electronic document management system tailored to meet the City's administrative needs.

1. Allow for easy retrieval of necessary documents by City administration using document management solutions desktop client or website.

Laserfiche meets the City's requirement for easy document retrieval by offering robust document management solutions accessible via both desktop clients and a web-based platform. Through Laserfiche Web Access, the City's administrators can conveniently retrieve documents from any location using a standard web browser, providing flexibility and accessibility across devices such as Windows, Mac, Android, and iOS. The Laserfiche Client desktop application provides advanced search capabilities,

including metadata-driven searches and full-text search functionalities, enabling quick and precise document retrieval based on various criteria like document type, date, or specific keywords. Laserfiche's efficient indexing and metadata tagging further enhance searchability, providing that important records are easily located and accessed when needed. Overall, Laserfiche's integrated suite of features supports seamless document retrieval for the City's administration, enhancing operational efficiency and facilitating effective document management.

2. Implement systems solutions to scan, index, store, search, and backup paper files.

To implement effective system solutions for scanning, indexing, storing, searching, and backing up paper files, Laserfiche offers a comprehensive platform. Laserfiche enables seamless scanning of paper documents using integrated scanning devices, followed by efficient indexing through metadata and keyword tagging for organized storage. Its advanced search capabilities facilitate quick retrieval based on document type, date, or content, ensuring easy access to information. Laserfiche's centralized digital repository securely stores scanned documents while supporting scalability for large document volumes. Backup features within Laserfiche provide data integrity and support disaster recovery plans, providing a robust solution for managing paper files effectively and enhancing operational efficiency.

3. Automate processes to route, manage and control documents, document versions, and records.

Laserfiche provides robust features to automate processes for routing, managing, and controlling documents, document versions, and records. Through its Workflow Designer, Laserfiche allows users to create automated workflows that manage document routing, approval processes, and notifications, providing documents are directed to the appropriate departments or individuals based on specific criteria. The Business Process Automation feature enables the creation of complex business processes that include multiple steps, decision points, and integrations with other systems.

For document management, Laserfiche offers document versioning, which automatically tracks and manages document versions, allowing users to view version histories, compare versions, and restore previous versions if needed. The check-in/check-out feature provides that documents are not simultaneously edited by multiple users, maintaining document integrity by locking the document for editing until it is checked back in. Additionally, the Records Management module helps organizations comply with regulatory requirements by managing the lifecycle of records, supporting retention schedules, disposition policies, and auditing.

4. Create custom workflows, electronic forms, integrations, and comprehensive systems solutions to get information to the people and systems that need it.

Laserfiche enables the creation of custom workflows, electronic forms, integrations, and comprehensive systems solutions through several key features. The Workflow Designer allows users to design and implement custom workflows to automate business processes, route documents, and trigger notifications based on specific criteria. Laserfiche Forms facilitates the creation of electronic forms for capturing data, streamlining data entry, and initiating automated processes, with forms customizable to meet specific business needs and integrated with workflows for seamless data processing. Integration tools, including Laserfiche's API, connectors, and integration marketplace, enable seamless integration with other systems and applications, allowing information to flow smoothly between Laserfiche and other enterprise systems without manual intervention. Additionally, the Business Process Library offers a collection of pre-built templates and solutions that can be customized to meet unique business requirements, providing a comprehensive system for managing information and processes efficiently.

C.1.1 Products and Services

GSG offers comprehensive services that include providing new, high-quality, and defect-free equipment, materials, and products. These offerings meet stringent quality standards and contribute to the successful completion of any project.

Discovery

GSG provides a thorough examination and evaluation of current records, document management systems, and policies/procedures. This involves conducting detailed discovery sessions aimed at developing a strategic roadmap tailored to enhance and optimize the document/records management program.

Warranty

GSG addresses the specified requirements by outlining clear warranty terms for equipment and installations, detailing conditions and response times for component repair or replacement during the warranty period. We guarantee the availability of replacement parts, offer insights into the expected lifespan of equipment under normal use, and provide a comprehensive return policy for all supplied equipment.

Construction

GSG provides that all services are executed with professionalism and adherence to industry standards relevant to the specific service provided. This commitment guarantees that services are performed in a competent and workmanlike manner, meeting or exceeding established industry benchmarks for quality and reliability.

C.1.2 Tasks

A. On-site assessment/discovery interview sessions, with teams from City's departments/divisions, to identify record repositories and processes that result in the generation of records from the following departments.

GSG conducts on-site assessment and discovery interview sessions with teams from the City's departments and divisions to identify record repositories and processes that generate records. This approach involves direct engagement with departmental teams to gain a comprehensive understanding of existing workflows and document management needs, enabling tailored solutions and strategic recommendations for enhancing efficiency.

B. Assess current records requirements by the City and types of records generated (e.g., data, documents, messages, hardcopies, electronic/soft copies, etc.)

GSG conducts a detailed evaluation of the City's current records requirements by systematically analyzing the types of records generated. This involves comprehensive data collection and assessment methods to understand the full spectrum of record types, including data, documents, messages, hardcopies, and electronic/soft copies. Through this process, GSG gains insights into the specific record management needs of the City, enabling tailored strategies and solutions to optimize record handling and management practices.

C. Systems utilized to store records for both current and legacy documents.

Laserfiche provides a robust solution for storing both current and legacy documents through its versatile document management system. The City can establish centralized repositories within Laserfiche, structuring documents into folders and cabinets for efficient organization and retrieval. The

Laserfiche platform includes powerful version control features, providing systematic management of document revisions and a clear audit trail of changes over time.

Users benefit from advanced search capabilities, utilizing metadata and full-text search options to quickly locate documents. Laserfiche also prioritizes security with role-based access control, encryption, and detailed audit trails, providing that sensitive information is protected, and access is managed effectively. Furthermore, its integration capabilities facilitate the seamless import and consolidation of legacy documents from older systems, enabling organizations to maintain continuity in managing and accessing both current and historical records within a unified framework.

D. Current taxonomy and metadata implemented.

Laserfiche facilitates the implementation of current taxonomy and metadata standards through its robust document management system. Users can define and apply taxonomy structures, including hierarchical categories and tags, to organize documents systematically. Metadata capabilities in Laserfiche allow for the creation and customization of descriptive attributes such as document type, author, and creation date, providing documents are accurately categorized and searchable. These features are integrated seamlessly into workflows, enabling consistent document management practices, and improving efficiency in document retrieval and overall information management within the organization.

E. Existing data inventory systems from off-site record storage providers.

Laserfiche enables seamless integration with existing data inventory systems from off-site record storage providers through its versatile platform. Using robust import and migration tools, organizations can efficiently transfer data from diverse sources into Laserfiche's document management system, consolidating both current and archived records for unified access. Integration connectors further enhance connectivity by facilitating the retrieval and synchronization of data from off-site storage systems, ensuring organizations maintain a comprehensive view of their document inventory within a single platform. Custom development options provide flexibility to tailor integrations according to specific needs, enabling seamless compatibility with existing data management workflows.

F. Systems utilized to store records for both current and legacy documents.

Laserfiche provides a robust system for storing both current and legacy documents through its advanced document management features. Organizations can utilize Laserfiche's centralized document repositories, which allow for structured organization using folders and cabinets. Version control capabilities provide systematic management of document revisions, while powerful search and retrieval functionalities enable quick access to both current and historical documents using metadata and full-text search options. Laserfiche's security features, including role-based access control and encryption, safeguard document integrity and restrict access as needed. Integration capabilities further enhance its utility by enabling seamless migration of legacy documents from older systems into Laserfiche, providing continuity in document management practices across the organization.

G. Evaluation of adherence to the current Retention Schedule/Record Destruction Policy - Identification and evaluation of records generated (hard copy and/or electronic) - Applicable federal, state, and local laws/regulations.

Laserfiche supports the evaluation of adherence to current retention schedules and record destruction policies through its robust document management capabilities. Organizations can define and apply retention schedules to both hard copy and electronic records, providing compliance with applicable federal, state, and local laws/regulations. Laserfiche's workflow automation features facilitate the identification and classification of records based on predefined retention rules, enabling systematic evaluation of records generated across different formats. Audit trail functionalities provide

transparency into the lifecycle of documents, supporting compliance audits and providing adherence to retention policies. Integration with legal and regulatory databases enhances compliance efforts by keeping organizations informed of evolving requirements, enabling proactive management of record retention and destruction practices within a secure and centralized environment.

H. Current system used for record storage (current and archived).

Laserfiche serves as a comprehensive solution for both current and archived record storage through its advanced document management capabilities. Organizations can utilize Laserfiche's centralized repositories to store and organize records efficiently. The platform supports the storage of documents in various formats, including electronic files and scanned hard copies, ensuring all types of records are securely stored and easily accessible. Laserfiche's version control features enable organizations to manage document revisions effectively, while its robust search and retrieval functionalities allow users to quickly locate, and access records based on metadata, full-text search, and advanced filtering options.

I. Areas of potential record duplication.

Laserfiche addresses areas of potential record duplication by providing robust tools for identifying and managing duplicate records within its document management system. Organizations can utilize features such as duplicate detection algorithms and manual review processes to identify duplicate records across different repositories and document types. Laserfiche's integration capabilities also supports the consolidation of records from multiple sources, allowing organizations to streamline their document management practices and reduce the risk of duplication. By implementing these features, Laserfiche helps organizations optimize their record management processes, ensuring data consistency and efficiency in document handling.

C.1.3 Document Management System Capability

Laserfiche system supports on-premises and Cloud Based/SaaS Content Services Platform.

Document Management System Capability	
City's Requirements	GSG's Solutions
A. Be Compatible with all modern web browsers (Edge, Firefox, Chrome, Safari, etc.)	Laserfiche Web Access supports Internet Explorer, Firefox, Chrome, and Safari, on both Windows and Mac OS.
B. Utilize a mobile-friendly, responsive design that is compatible on iOS and Android Mobile devices.	Laserfiche provides a mobile-friendly and responsive design that is compatible with both iOS and Android mobile devices through its Laserfiche Mobile app. The app allows users to access and interact with documents and workflows seamlessly from their smartphones and tablets. It features a user-friendly interface optimized for mobile use, enabling efficient document viewing, editing, and collaboration on the go. Laserfiche Mobile supports responsive design principles, ensuring that content adapts smoothly to various screen sizes and orientations, providing a consistent and intuitive user experience across different mobile devices.

<p>C. Allow City System Administrator to configure role-based permissions and individual user permissions.</p> <ul style="list-style-type: none"> • Estimated 8 Full User Licenses (Read/Write access and ability to participate in forms/workflow processes) • Estimated 8 Participant Licenses (Read only access and ability to participate in forms/workflow processes) • Minimum of 100GB of Storage per Full User License shared by the entire system. 	<p>Laserfiche allows the City System Administrator to configure role-based permissions and individual user permissions efficiently. Administrators can define and manage permissions at both the role and individual user levels, providing granular control over access to documents, forms, and workflow processes. This includes assigning Full User Licenses for approximately eight users with read/write access and participation rights in forms and workflows, as well as Participant Licenses for approximately eight users with read-only access and participation rights in these processes. Each Full User License includes a minimum of 100GB of shared storage capacity across the entire system, providing ample space for document storage and management needs. Laserfiche's flexible licensing and storage allocation options support tailored configurations that meet specific user roles and organizational requirements, enhancing security, collaboration, and efficiency within the document management framework.</p>
<p>D. Allow users to enter search parameters to locate documents by reference number, application name, document type, date received, site address and other entered attributes.</p>	<p>Laserfiche enables users to enter search parameters to locate documents efficiently by leveraging its robust search and metadata capabilities. Users can input search criteria such as reference numbers, application names, document types, dates received, site addresses, and other attributes directly into the search interface. Laserfiche supports advanced search functionalities that include full-text search across document contents and metadata fields. Additionally, organizations can customize metadata fields to capture specific attributes relevant to their document management needs, providing comprehensive search capabilities tailored to their workflows.</p>
<p>E. Allow City Application Administrator to configure new folders, subfolders, document attributes, and document types without Contractor's assistance. Administrator can select whether confidential folders are visible in the customer-facing interface.</p>	<p>Laserfiche empowers the City's Application Administrators with the ability to independently configure new folders, subfolders, document attributes, and document types within the system, eliminating the need for Contractor assistance. Administrators can seamlessly create hierarchical folder structures, define, and customize metadata attributes to enhance document categorization and searchability, and establish various document types to classify content effectively. Additionally, administrators have the flexibility to manage visibility settings, including the option to select</p>

	whether confidential folders are visible in the customer-facing interface.
F. Allow Users to configure their own search parameters to enable searching by a variety of attributes, for example: reference number, date received, and document type.	Laserfiche provides the ability for users to configure their own search parameters through its powerful search feature, which includes the Advanced Search functionality. This allows users to create custom search queries by specifying various attributes such as reference numbers, dates received, and document types. By using custom search templates and filters, users can tailor their search criteria to pinpoint exactly the documents or records they need, enhancing both efficiency and accuracy in retrieving information.
G. Have option for Cloud-based storage	Laserfiche offers Cloud-based storage through Laserfiche Cloud , which provides scalable and secure storage options accessible from anywhere, supporting the flexibility and remote access needs of organizations.
H. Allow City to retain ownership of the data stored on the platform and the ability to extract it in full at any time.	Laserfiche allows users to maintain ownership of their data stored on the platform and provides the capability to extract data in full at any time, enabling control and flexibility in managing their information.
I. Allow the direct import of common electronic document types (such as, but not limited to: TIF, PDF, JPG, Microsoft Office standard formats such as docx and xlsx).	Laserfiche facilitates the direct import of common electronic document types such as TIF, PDF, JPG, DOCX, and XLSX through its versatile import functionality , making it easy to integrate a wide range of document formats into the system.
J. Be easy to navigate, user-friendly user interface.	Laserfiche is designed with a user-friendly interface that simplifies navigation and enhances usability, allowing users to manage and retrieve documents efficiently without a steep learning curve.
K. Allow for add-on for Microsoft Office Integration to enable import of emails directly into system.	The Microsoft Office Integration add-on allows users to import emails and documents directly into Laserfiche, streamlining the process of incorporating Microsoft Office content into the system.
L. Allow for files can be uploaded by using a drag-and-drop system.	Files can be imported through drag/drop, cut/copy/paste, or the import menu. When folder structures from Windows are imported, the system can automatically recreate it in Laserfiche (to replicate the structure of a network share for example). Laserfiche also provides automated import tools that are configured to poll network directories (for ftp sites, fax servers, multi-function devices, etc.) based on a predetermined schedule and can name, file

	and index documents automatically based on predetermined business rules.
M. Allow Application administrator to upload document templates for use by users.	Laserfiche allows application administrators to upload document templates for user access, facilitating standardized document creation and management across the organization.
N. Enables storage of application presentation documents, such as PowerPoint files, photographs, and videos.	Laserfiche accommodates the storage of various application presentation documents, including PowerPoint files, photographs, and videos, providing comprehensive document management capabilities.
O. Identify duplicate documents within a folder.	Laserfiche includes duplicate detection features that identify and manage duplicate documents within a folder, preventing redundancy and maintaining a clean repository.
P. Records Management Module to allow for assigning and tracking retention for files.	The Records Management Module in Laserfiche supports assigning and tracking the retention of files, aiding compliance with retention policies and facilitating effective records management.
Q. Audit Trail Module to track and report on events in the CSP.	Laserfiche offers an Audit Trail Module that tracks and reports on events within the Content Storage Platform (CSP), providing detailed logs and insights into user activities and document interactions for enhanced oversight and accountability.

C.1.4 Functional and Technical Requirements

GSG has filled out and attached the attachment D - Functional/Technical Requirements

C.1.5 Public Portal Interface

Laserfiche's Public Portal Interface meets the specified requirements by providing a range of functionalities for read-only access. It displays the total number of documents in a folder, allows users to download and print documents while applying any necessary redactions, and enables administrators to redact sections from public view with redactions reflected in downloaded copies. Laserfiche portal also supports generating hyperlinks to specific documents for use in reports and communications, offers multilingual support and customizable interface elements, adheres to ADA compliance standards for accessibility, and provides an at-a-glance status of applications based on metadata, summarizing application statuses for public viewing on the City's website.

Public Portal Interface	GSG's Solutions
A. Include a count of the total number of documents in a folder.	Laserfiche Public Portal provides a document count feature, displaying the total number of documents contained within a folder to users accessing the portal.
B. Enable the downloading and printing of documents.	Laserfiche users can download and print documents directly from the Public Portal. The portal

	facilitates these actions while maintaining the read-only access settings.
C. Allow Administrator to redact sections of documents from public view if needed. Printed and downloaded documents include the redaction in the downloaded version.	Laserfiche provides redaction tools that allow administrators to redact specific sections of documents. These redactions are visible in both the online view and in downloaded or printed copies, providing sensitive information is protected.
D. Ability to generate hyperlinks to specific documents within the system to allow these to be used in reports, emails, etc.	Laserfiche Public Portal supports generating hyperlinks to specific documents, which can be used in reports, emails, or other communication methods to directly reference and access particular documents.
E. Ability to select different languages and/or photos within the interface.	Laserfiche's Public Portal Interface supports multilingual functionality and customizable interface elements, allowing users to choose from different languages and update photos to suit their preferences, enhancing user experience and accessibility.
F. ADA Compliant Interface.	Laserfiche Public Portal Interface is designed to be ADA compliant , adhering to accessibility standards so that users with disabilities can navigate and interact with the portal effectively.
G. At-a-glance status of applications based on input meta-data (i.e., meta-data and attributes can be added to application folders in addition to documents within folders to enable application status to be published/summarized via a page on the City's website.	Laserfiche uses metadata and attributes to provide an at-a-glance status of applications, allowing the system to summarize and publish application statuses on the City's website based on metadata added to application folders and documents.

C.1.6 Reporting and Management

Our proposed Electronic Document Management System meets the following requirements such as:

Reporting and Management	GSG's Solutions
A. System generates reports of number of documents accessed, imported, uploaded, edited, and deleted. Results can be refined by user.	Laserfiche's Reporting and Analytics features generate detailed reports on document activities such as access, import, upload, edit, and deletion. These reports can be customized and refined by user preferences to provide insights into document interactions and management.
B. System collects information on when documents are accessed/viewed/modified and downloaded.	Laserfiche's Audit Trail functionality collects and records information on when documents are accessed, viewed, modified, and downloaded, providing comprehensive logs for tracking document interactions.

C. System can generate reports on total size of all data stored in the system and, depending on whether system is Cloud-based, where data is being stored.	Laserfiche's Storage Management tools generate reports on the total size of all data stored within the system. For Cloud-based deployments, it also provides details on data storage locations, offering visibility into where data is hosted.
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C.1.7 Testing


GSG addresses the testing and implementation requirements through a structured approach. Upon receiving the notice to proceed, GSG initiates the implementation process by thoroughly configuring the system to align with the City's functional requirements. GSG conducts comprehensive functional testing to verify that all configurations are accurate and meet the specified criteria. Our team coordinates with the City's stakeholders are prioritized to address any issues and confirm that the system performs as expected before final deployment.

C.1.8 Training

GSG provides multiple options for training. Our team is led by a Gold Certified Laserfiche Professional, and all team members have Laserfiche training and certifications, including Laserfiche Platinum Certification. Our project manager will provide a training plan and knowledge transfer plan for support and training. Our Training plans are developed as part of the project's Statement of Work and address the City's specific operational and administrative needs. Once will prepare the project plan will give it to the City for approval. After getting approval from the City will start it. As per City requirement will provide all modules. Our team will work closely with the City's SME and the training team to develop City specific scenarios for each module. Our training staff will provide all the training documentation in editable format to end users, administrators, and developers.

End-User Training: We will provide training material and training using a train the train approach aside from training business users, and system administrative staff. In addition, GSG will provide Level 1 support documentation for the City and specific training for each end-user group. Also, we will develop user-friendly training materials and eLearning modules for the City's use after implementation. Training will be provided to the City's staff, and other end users at a City provided facility. We will also provide up to date training sessions for specific user groups to ensure successful implementation with an overview of ongoing refresher training options to select from. The training will be performed on-site which will include, an overview of the all the system components, identification of resource for ongoing support, and finally, training of the technical staff for all components of the system that are not standard to the City.

End-User Training is targeted at users who will be using the system on a day-to-day basis. This can include power users who will be scanning documents and regular users who will be performing search and retrieve operations. The following items will be covered during an eight (8) hour training course:

	Structure	Editing	Conversion	Distribution
End User Training Agenda 	<ul style="list-style-type: none"> Folder Browser Laserfiche Client Overview Laserfiche Searching Metadata Microsoft Integration Quick Fields 	<ul style="list-style-type: none"> Annotations Copy and Paste Drag and Drop Laserfiche Capture Saving searches Separating Document Pages Tools 	<ul style="list-style-type: none"> Converting Electronic File Formats Enhancements Generating Searchable Text Import Merging Document Pages 	<ul style="list-style-type: none"> Distribution in Laserfiche Emailing Entering and Recording Exporting Printing


	<ul style="list-style-type: none"> Repository Structure Document Management 	Display	<ul style="list-style-type: none"> Scanning Options Scanning Processes Search options Metadata 	
		<ul style="list-style-type: none"> Display Panes Document Viewer Snapshot Tips and tricks 		

While it is vital to ensure that your Laserfiche systems are current, it is equally vital that personnel using Laserfiche are kept current through training, and we will provide ongoing training opportunities. Training sessions can include workshops, webinars, and other eLearning options. Should any patches or updates alter the operation of your system, we will arrange training sessions or user group meetings in order to ensure that personnel remain fully up to date with utilizing Laserfiche. We will also facilitate access to other training programs hosted by Laserfiche.

Train the Trainer Approach	Laserfiche is an intuitive application to learn and part of its enduring power is the simplicity of use. GSG's training program is designed for clients to gain autonomy and independence in the routine use and management of their Laserfiche system with a "train the trainer" approach. We have found this to be the most effective training methodology in terms of knowledge retention and value of training time.
Ongoing Training	End-user training is targeted at users that will be using the system on a day-to-day basis. This can include power users that will be scanning documents and regular users that will perform search and retrieve operations.
System Administrator	System Administration training is targeted to users that will be maintaining the system once it has been promoted to production.
Application Training	Application Training targets business analysts that may be involved in modifying existing business processes or expanding the use of Laserfiche in other departments.
System Administrator Training	System Administrator Training will cover the tasks necessary to administer the software, such as adding, removing, and modifying users and user rights. In addition, training will be provided to administer workflows and create AD-HOC reports and queries. We highly recommend that the system administrators also participate in user training.

Attendees can include managers, supervisors, and technical personnel as determined by the client. Multiple sessions may be scheduled to minimize the impact on normal operations and personnel will be on-site to assist with any issues that may arise during go-live.

System Administrator Training will include the following in five (5) hours of training:

System Administrator Training Agenda 	Structure
	<ul style="list-style-type: none"> Laserfiche Administration Laserfiche Administration Console Sever Settings Security Audit Trail - Report Creation/Generation Metadata Management Indexing Troubleshooting

	<ul style="list-style-type: none"> • System Maintenance • Repository Management
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Additionally, we offer special training sessions for the following:

<p>Laserfiche Workflow Admin Training: This hands-on training is for users who will be designing Workflows within the Laserfiche system. This class is not exclusive to IT, but users should be technically savvy and familiar with IF/THEN logic. Some of the topics covered in this training are: Parallel and Conditional Routing, Email Notifications, Reminders/Deadlines, and Repeat/Looping related to business processes. Laserfiche Client and System Admin Training is a prerequisite for this class.</p>	<p>Laserfiche Audit Trail Training: This hands-on group training is for users who will be generating or viewing audit reports on the Laserfiche Repository. Laserfiche Audit Trail is typically used to investigate the viewing, retrieval, or export of a document from the Laserfiche Repository. This class is typically limited to administrators and power users with comprehensive access to the Laserfiche Repository. Laserfiche Client Training is a prerequisite for this class.</p>	<p>Laserfiche Quick Fields Training: This hands-on training is for users who will be creating Quick Fields Sessions. Typically, this training is restricted to IT or multiple people. Once a Session is created, it can be used Power Users of Laserfiche as. As such, only interested parties should attend. Class material is dependent on the purchase of Quick Fields. Laserfiche Client Training is a prerequisite for this class.</p>
<p>Laserfiche Forms Training: This hands-on training focuses on the design and configuration of electronic fillable forms.</p>	<p>Application Training: Target's business analysts who may be involved in modifying existing business processes or expanding the use of Laserfiche into other departments.</p>	<p>Search and Retrieval Training: This session includes detailed instruction on the various methods for searching within Laserfiche, including Quick Search as well as the Customize Search option for more advanced search criteria. This session also covers search results and what information is returned, how to open and view documents, and how to utilize the information returned.</p>
<p>Laserfiche Records Management Training: This hands-on training covers basic records management concepts for records managers and for general staff.</p>	<p>Integration Training SDK/LF Connector: This training applies to using the Software Developer's Kit (SDK) and/or LF Connector to integrate Laserfiche with a specified line of business applications.</p>	<p>Laserfiche Scanning Training: This group training is for users who will be scanning documents using Laserfiche Scanning. Topics discussed in the training are indexing, shortcut keys, batch processing techniques, and cleanup tools.</p>

C.1.9 Deliverables

In assessing the City's current system and proposed solution, GSG will deliver a comprehensive **Assessment Report** detailing the evaluation of the existing system, a **Requirements Analysis** capturing the City's functional and technical needs, and a **Proposed Solution Document** outlining the recommended solution with technical specifications and design considerations. Additionally, GSG will provide an **Implementation Plan** that includes steps, timelines, and resources for deployment, a **Risk Assessment** identifying potential risks and mitigation strategies, a **Cost-Benefit Analysis** comparing costs and benefits of the new solution, and a **Testing and Validation Plan** to provide the solution meets the City's requirements and performs as expected.

- After the kick-off meeting, our project manager will provide the workplan and timeline for the project task which will cover all the requirements.
- GSG will produce a Findings Report that details the comprehensive results from the assessment, evaluations, and on-site meetings. This report will summarize the current system's strengths, weaknesses, and areas for improvement based on the conducted evaluations.
- GSG will conduct a Key Stakeholder Meeting to present the gap analysis findings from the assessment and on-site meetings. This presentation will be delivered to the City's identified project team to review and discuss the findings in detail.
- GSG will recommend retention processes that apply to different record-generating systems, aiming for consistency and efficiency in records management across various processes.
- The deliverables will include a detailed analysis of costs and strategies for implementing automated retention processes across multiple enterprise systems, outlining the financial considerations and steps for successful integration.
- GSG will provide strategies to reduce impacts on both current and future document users and resources, focusing on minimizing new requirements and streamlining document management processes.
- GSG will suggest methods to improve document availability and accessibility, such as implementing advanced search functionalities, integrating digital platforms for easy access, and adopting user-friendly interfaces to support business operations and foster transparency.
- GSG will provide strategies to reduce long-term document management costs, including optimizing on-site and off-site storage solutions, enhancing retrieval processes, and adopting efficient backup and storage practices for electronic documents.
- GSG's recommendations will focus on reducing the City's liability related to document retention and destruction, ensuring adherence to legal requirements, and implementing best practices for compliance with relevant regulations.
- Once the scanning is done, GSG outline guidelines for document destruction, transference, and conversion, including procedures for safely handling document lifecycle transitions and converting formats as needed while maintaining security and integrity.
- GSG will assess the space and equipment needed for effective record filing and determine if reducing off-site storage can lead to cost savings, evaluating both internal and external storage options.
- GSG will offer general guidance on implementing new policies, processes, and procedures, focusing on practical steps and strategies to facilitate smooth adoption and integration.

- GSG will provide recommendations for change management, including training programs and ongoing management practices like self-auditing to support effective system implementation and adaptation.
- GSG will discuss with the city for additional recommendations as needed.
- Our project manager will work with the City's contracting officer to decide the schedule of the project, its milestone, and phases.

C.1.10 Value Added Products or Services

GSG is a Platinum-Certified Value-Added Reseller (VAR) of Laserfiche. As a Certified VAR, GSG has the requisite capability to provide all the services to District. Our team is led by a Gold Certified Laserfiche Professional, and all team members have Laserfiche training and experience, including Laserfiche Platinum Certification. Currently, GSG is providing Professional Services, Training and Support to City, State and Federal Government projects with Laserfiche Certified Key Personnel.

Project Management

GSG's Project Managers are highly trained in implementation, workflow processes, integration, and more to help your organization implement a well thought out enterprise-wide system based on needs. They are Laserfiche Gold Certified and hold other professional certifications to maintain a high knowledge level of client's business processes.

Configuration and Deployment

The highly trained and experienced engineering and consulting staff of GSG is available to develop and deliver a Laserfiche solution configured to meet the City's needs. To deploy our services, we use an agile project management methodology which provides a predictable, reliable deployment strategy to ensure a timely and successful implementation of our system. Prior to deployment, our engineers will sit to understand the City's requirements in the detail, including the business processes and how they are currently structured, how the City's staff interacts with the documentation on a given day, as well as understand the overall goals of the departments. Our engineers pride themselves on being able to take a process and re-engineer it, so that tasks can be automated and streamlined for efficiency.

Planning and Management

With the experience our engineers have gained over the years, they will put a project plan in place to outline a timeline for project completion. Using the agile methodology, they will be able to constantly adjust how phases are accomplished and will work to meet the needs of the departments. During the requirements gathering, our engineers will be able to estimate the number of days needed for such things as software installation, configuration, training and any design or migration that may take place.

System Security

Among our core capabilities, GSG has a strong Cybersecurity support team. This expertise informs every other aspect of our work. We know how to ensure the most secure configurations for your systems to ensure that your data maintains the five pillars of information assurance: ***Integrity, Availability, Authentication, Confidentiality, and Nonrepudiation.***

Dedicated Support and Training

GSG provides dedicated support staff for trouble shooting and supporting Laserfiche system. Our staff can be easily reached via email, phone, or our online support facility. GSG has a team of technical engineers who will be focused on the design, implementation and roll out of this project. Within the scope of the implementation, technical support is built into the deployment process for any personnel

needing assistance. Because we know that support is important, we will place a dedicated technical engineer to answer questions as needed, who will also manage the knowledge transfer and product training development and documentation.

Other Services

GSG managed services package provides additional training, support, and services to Laserfiche administrators and end users.

Additional Training - Additional web-based training is conducted to train new users or as refresher training for existing users.

Additional System Setup Consultation – We offer additional best practices consultation that includes recommendations for adding additional departments, additional types of indexing, etc.

Remote implementation of software updates – While renewal covers free version updates for software, implementation of those updates is sometimes overlooked. With the additional managed services, GSG is at your service to directly assist with implementing software updates such as minor updates, quick fixes or point releases. Dependent on complexity and client-specific configurations, major software upgrades may or may not be covered and should be discussed with your Account Management Team.

Annual System review and analysis - GSG will access your system to review how your organization uses Laserfiche to identify issues and to make recommendations for better use of the system. This analysis may be performed annually and is an optional service that will be completed only if requested by the city.

Remote access support – Our Support Technicians can access your Laserfiche System remotely to resolve issues, saving both time and money.

C.2.Executive Summary

Global Solutions Group, Inc. (GSG) understands that City is looking for a document management system. GSG offers demonstrable proficiency, stability, and a proven record of superior past performance. Many of our government clients have relied on us for decades to provide a wide range of DMS services. We have the capacity, as well as personnel with similar experience and qualifications, to manage this contract expertly and effectively. We offer a balanced combination of experience and innovation. As a result of our experience, our personnel are ready from Day one to provide the service and meet all your performance standards.

GSG offers complete and cost-effective document management solutions using high-end infrastructure and technology to provide customers around the globe with quality services delivered on schedule. We have been providing technology, document management, and digitization services for 21 years. We have added to our service portfolio while maintaining our mission to provide excellence in service and value to our clients. We are a Platinum Certified Laserfiche Value Added Reseller (VAR) with the knowledge, experience, and proficiency to successfully install any size of Laserfiche System for any type of business.

Currently, GSG provides document management system for the county, state, and federal government projects. GSG has over 21 years of experience in providing similar services with various clients. We work with numerous municipalities, authorities, state and local governments, and agencies to deliver digital oversight, strategy, and implementation services that enhance the way they conduct business with their stakeholders, workforce, and the public.

Our value proposition is simple – deliver the highest quality services at the lowest possible cost, while mitigating project risks. We do this by leveraging our unique delivery model that combines senior “onsite” consultants with “offsite” consultants located in our three US-based technology centers.

GSG and its team of Certified Laserfiche Consultants bring the in-depth knowledge and experience who can understand your business models / processes, and then build very effective solutions around them. Our Laserfiche Certified team has in-depth awareness of the platform to provide well-grounded expert services to our clients.

GSG has an experienced Project Manager and technical team who work with our clients to design and implement scalable and secure Laserfiche solutions. Our resources have experience in designing and implementing complex custom Laserfiche solutions including identity and access management strategies by communicating the design and solution trade-offs to technical and business stakeholders alike. Our resources perform the configuration requirements of delegated authentication and regularly review project management process in Laserfiche, determining the general identity federation capabilities that are available for a given project, the applicable use cases, and determining appropriate user lifecycle management techniques. We provide insight in advanced business analysis, conduct assessments, configure apps, as required, and assist in key functions involving client and staff development, training, and on-going client support. Our experts analyze data migration requirements, translating those requirements into a data migration approach for the Laserfiche platform. We develop and execute a data migration plan to include, extract coordination from a source system, conversions, and transformations as necessary, import execution and data validation. GSG’s experts have knowledge of general change management and learning principles, methodologies and tools especially “Train the Trainer” model and learning tools for virtual environment.

In the following proposal, we will show GSG’s capability and experience that we will manage the documents according to the RFP’s requirements and conditions. We provide details and general information regarding GSG and how we will approach the requirement for digitization services, security, confidentiality, and compliance.

GSG's key services include document management, cyber security, and staffing and information technology services. We provide document digitization, database management, cyber security consultation and assessments, Cloud support, software implementation, help desk support, mobile technology, and networking support to a wide range of city, state, and federal government clients. We are a Microsoft Gold Partner, recognizing our capabilities in providing Microsoft Managed Services as well as Azure Cloud Services, and we are Amazon Web Service (AWS) partners, giving us the ability to support AWS Cloud services.

Our project team is responsible for contributing to the overall project objectives and specific team deliverables by contributing to the planning of project activities and executing assigned tasks/work within the expected quality standards, to ensure the project is a success. Contributing to the overall project objectives. Completing individual deliverables providing expertise.

We are currently providing Laserfiche Document Management Services (including Scanning, Digitization, Storage, Shredding, ECM, and EDMS) to city, state, and federal governments, and educational institutions. We understand that the key to the successful fulfillment of a contract requires a level of response that exceeds client expectations. GSG implements a proven, highly successful, delivery model that enhances capabilities and communicates data effectively.

Why GSG’s Services:

- Key personnel who have been trained and have experience in ensuring the integrity of the City's physical and digital documents.

- Increases efficiency and effectiveness while continuously improving work quality
- Prompt response to City personnel inquiries
- High-quality output and successful completion with metrics ensure that the City's project is completed on time.
- The city can be confident that their documents will be treated professionally.
- The documents of the City will be safeguarded against environmental and security threats.

Our proposal follows the format prescribed in the RFP as closely as possible, and we have tried to be concise in our responses. We would be pleased to discuss any aspect of this proposal to provide additional information related to our proposed solution or ability to deliver, if requested.

C.3.Proposer Team Identification, Qualifications, and General Information

ECM Key Project Staff

Our technical staff are certificated in Laserfiche Administration, Laserfiche Workflow, Laserfiche Forms, Integration, Capture Agent (Quick Fields), .Net, SQL DB, Oracle, SharePoint, etc., and work with several product vendors to provide support for custom solutions. GSG has a solid core in place to lead this project. From the Program Manager to technicians, all personnel have experience with the implementation and maintenance of Laserfiche products. Key personnel for this project are all Laserfiche certified professionals. Additionally, we have an extensive pool of skilled and experienced personnel to support our implementation efforts. Project supervision is based on PMI project management methodology in allocating work and assigning tasks. The project plan is reviewed with the client to assure all necessary resources are available, the project plan meets the timeframe, and all tasks have been identified and assigned. All personnel will be available upon award of contract.

Designation	Key Personal Name	Qualification	Years of Experience
Project Manager	Nish Dani <i>Laserfiche Gold Certified PMP</i>	BS, Information Technology	10+
Responsibility: Mr. Nishi Dani manages Laserfiche projects and has a deep understanding of business process requirements and delivers large-scale, complex projects and programs that combine processes with technology to assist in application design, development, integration, testing, and deployment, and application technical architecture. Assists clients with technology in application design, development, integration, testing, deployment, and application technical architecture.			
Operations Lead/Manager/Help Desk Specialist	Bhavin Mehta <i>Laserfiche Platinum Certified</i>	MS, Computer Application BS, Engineer	17+
Responsibility: Mr. Bhavin Mehta performs project design and development activities according to the client's specifications. Works with the Project Manager in developing project plans, budgets, and schedules. Tracks project progress and develops status reports for management. Provides assistance to other developers, performs peer reviews, and provides feedback for improvements. Develops cost-reduction initiatives while maintaining quality and productivity.			
Laserfiche Solution Engineer	Rituraj Kumar <i>Laserfiche Platinum Certified</i>	BS, Computer Science	7+
Responsibility: Mr. Rituraj Kumar works closely with clients and stakeholders to understand their business requirements and design tailored solutions using Laserfiche software. Responsible for implementing and configuring the Laserfiche system according to the designed solution. Conducts			

thorough testing of the Laserfiche system to ensure its functionality and performance. Has excellent experience in identifying and resolving any issues or bugs that arise during the implementation phase.

Business Analyst

Rohit Betwal
(Laserfiche Platinum Certified)

B.E., Computer Engineering

5+

Responsibility: Mr. Rohit Betwal works closely with clients and stakeholders to gather and document their business requirements. Will conduct interviews, workshops, and meetings to understand the client's needs, pain points, and desired outcomes. Based on the gathered requirements, will collaborate with Solution Engineers and other team members to design the optimal solution using the Laserfiche software. Acts as a liaison between different stakeholders, such as business users, IT teams, and management. Provides training and support to end-users on how to effectively use the Laserfiche solution. Training includes user documentation, conducting training sessions, and offering ongoing support to address user inquiries or issues.

Business Analyst /Functional Lead

Rajiv Oza
Laserfiche Platinum Certified

Master of Science

4+

Responsibility: Based on the client's requirements, Mr. Rajiv Oza solutions and planning strategy methodologies to the team. Oversees the configuration and customization of the Laserfiche system to meet the specific needs of the client. Provides leadership and guidance to the project team, including solution engineers, business analysts, and other team members. Engages and manages relationships with key stakeholders, such as clients, business users, IT teams, and senior management.

Support Engineer

Kia Ghiam
Laserfiche Platinum Certified

BS, Communications


5+

Responsibility: Mr. Kia Ghiam is responsible for providing technical support to Laserfiche users and clients. Will interact with customers through various channels, such as phone, email, and online support tickets, to understand their technical concerns and help. Responsible for replicating reported issues in a controlled environment to better understand and troubleshoot them. Provides technical expertise to analyze system logs, error messages, and diagnostic information to diagnose problems accurately. Updates the latest Laserfiche product releases, enhancements, and features.

Resumes of the Key Personnel

Project Manager - Nish Dani


Education	BS, Information Technology							
Laserfiche Certifications	Gold ★	Specialist ★	Admin I ★	Admin II ★	Capture I ★	Capture II ★	BPM ★	Repos. Arch ★
Certifications and Licenses	<ul style="list-style-type: none"> Project Management Professional MCSA: SQL 2016 Database Administration 							
Experience Summary	<ul style="list-style-type: none"> Laserfiche Gold Certified Professional, PMP, and ITIL V3. Over ten years leading successful implementing of Laserfiche Document Management software and services. Project Management Professional (PMP) with considerable experience delivering large-scale, complex projects, and programs that combine processes with technology assist in application design, development, integration, testing, deployment, and application technical architecture. 							

	<ul style="list-style-type: none">Experienced and certified in Laserfiche Project Management principles, technologies, best practices, and trends, understands what is required to ensure full compliance with related laws and regulations (i.e., Section 508 compliance).Experienced with integration of the Laserfiche client and workflows and has designed, implemented, and administered document imaging and workflow solutions using Laserfiche Workflow, Quick Fields, and Web link.Currently, is working with the Department of Commerce on an ongoing DMS project.			
	Team Experience	GSG Employment	Time with Other Key Employees	Number of Projects Work with Key Employees
		15 Years	13 Years	50+ Projects
Work History				
2021 Ongoing	-	State of Tennessee – Higher Education Commission (THEC) Laserfiche Document Management System		
<ul style="list-style-type: none">Monitored and controls the progress of the project and ensures that key milestones, actual performance against planned and scheduled performances.Supported and provided guidance for issue identification and resolutions, cost estimating and time management.				
2019 Ongoing	-	State of North Carolina – Department of Agriculture (NCDA&CS) Laserfiche Document Management and Retrieval System		
<ul style="list-style-type: none">Supported developing, implementing, and refining the server applications that lie at the heart of the Laserfiche product line—all while optimizing security, scalability, and performance under load.Developed project plan and provided the solutions ideas.Maintained the projects progress and setting deadlines.				
2019 - 2022		Fort Worth Housing Solutions, Texas Electronic Document Management/Workflow Software		
<ul style="list-style-type: none">Worked with a contract manager and FWHS for requirement gathering.Assigned task to technical lead and business analyst for requirement analyzing, guiding client and team.				
2019 – 2020		Department of Health and Human Services, Centers for Medicare and Medicaid Services (DHHS-CMMS), CMS Laserfiche Maintenance Support		
<ul style="list-style-type: none">Managed project plan for Laserfiche installation, maintenance, and support for DHHS-CMMS.Provided guidance for all Laserfiche required modules and manage supports services staff.				
2017 Ongoing	-	U.S. Department of Commerce, Office of the General Counsel (OGC) Law Firm Document Management System		

<ul style="list-style-type: none"> Provided a Laserfiche Document Management Application to the Department of Commerce that was customized to meet legal office requirements. <p>Managed Go-Live Implementation and Post Go-Live Operations Support.</p>	
2017 Ongoing	U.S. Department of State Laserfiche Upgrade and Support <ul style="list-style-type: none"> Managed upgrade of the State Department Laserfiche server and client from version 8.1 to 9.2. Supported sixteen desktop clients with Laserfiche client applications (see TOC for application details) running on a Windows XP operating system. Upgrading the desktops with Windows 7 Professional operating system. Created a Security model and implemented across the users of the repository for restricting the access of the users only to certain documents by using Laserfiche Administration Console. Performed troubleshooting and rapid response when the Laserfiche system is malfunctioning. Identified which component is problematic and recommended a course of action and alternatives, updating, or reconfiguring the Laserfiche server, client application, or components. Performed security configuration changes on the operating system, database, and application servers as a part of the continuous security monitoring of these systems.
2017 Ongoing	Department of the Interior, Office of the Chief Information Officer Laserfiche Document Management System (LDMS) Support <ul style="list-style-type: none"> Managed support for Laserfiche Avante, Laserfiche Rio, Laserfiche SQL Server, Laserfiche Workflow, Laserfiche Quick Fields, Laserfiche Scanning, Laserfiche Weblink, Laserfiche Audit, Laserfiche Plus, Laserfiche Software Development Toolkit (SDK), and Laserfiche iPad. Provided technical support for ongoing Federal Information Security Management Act (FISMA) and Third-Party Intrusion Detection security sweeps, corrections, and testing as appropriate and only in relation to Laserfiche. Serving as the primary Laserfiche technical support as point of contact.
2017 Ongoing	State of Iowa – Veterans Home (IVH) Laserfiche Document Management System <ul style="list-style-type: none"> Planned the project schedule and executed each phase, troubleshooting, and maintaining project. Managed resources and team members, arranging meetings with team members and status reports, and tackling any current issues.
2015 Ongoing	Howard University Student Records Digitization and Document Management Implementation <ul style="list-style-type: none"> Provided Project Management support for the implementation of a Laserfiche system to automate management of student financial aid and academic records. Gathered requirements from clients for their current workflow and design custom business processes and develop workflows using Laserfiche Workflow Designer 9.1.

- Captured information from hard paper using regular expressions and attach the data in the SQL database by using Laserfiche Quick Fields 9.1.

Laserfiche SME - Bhavin Mehta


Education			M.C.A., B. E.						
Laserfiche Certification	Gold	Platinum	Specialist	Admin I	Admin II	Capture I	Capture II	BPM	Repos. Arch
	★	★	★	★	★	★	★	★	★
Certifications and Licenses			<ul style="list-style-type: none">• Six Sigma – Green Belt• Certified Scrum Master and Scrum Fundamentals Certified• Certified Ethical Hacking Expert• ITIL 4 Foundation• Microsoft Certified Technology Specialist – MCTS• Project Management with MS Project plan• Advanced Cloud computation and Big Data, certificate• Machine Learning – Hands-On Python/R in Data Science, certificate• Web Centric Curriculum from NIIT certified						
Experience Summary			<ul style="list-style-type: none">• Worked as a lead in implementing complex solutions for various Government Clients. Expanded a vertical in Laserfiche, an Enterprise Content Management Software, and trained subordinates and worked for application integrations for Laserfiche, SharePoint, Office 365, and Accela.• Installed and configured multiple integrations of Laserfiche with various Lines of Business Applications (LOB) like GIS, Dynamics SL, Dynamics GP, SharePoint, Tyler Eden, BS&A Licensing and Permitting Software, and Accela.• Laserfiche, Enterprise Content Management Software – Quick Field, Workflow Designer, Forms, Import Agent, LF Client, Admin Console, and Workflow Admin.• Interfaces development for SharePoint and Laserfiche for application integration.• Developed and designed SharePoint applications.						
 Team Experience	GSG Employment			Time with Other Key Employees		Number of Projects Work with Key Employees			
	10 Years			10 Years		10 Projects			
Work History									
2021 Ongoing	-	State of Tennessee – Higher Education Commission (THEC) Laserfiche Document Management System							
<ul style="list-style-type: none">• Assisted other developers, performs peer reviews, and provides feedback for improvements.• Developed cost reduction initiatives while maintaining quality and productivity.									

<ul style="list-style-type: none"> Guided other team members on the project to ensure the content is accurate. Resolves issues relevant to project deliverable(s) within their area of expertise. 	
2020 - 2021	City of Inkster, Laserfiche Document Management System
<ul style="list-style-type: none"> Helped to integrate with other systems and perform migration from existing system. 	
2019 - 2022	Ft. Worth Housing Solutions, Texas Electronic Document Management/Workflow Software
<ul style="list-style-type: none"> Worked with the project manager and FWHS for implementing complex solutions and workflows. Integrated Laserfiche with Emphasys Elite (Housing Authority Software), and Office 365. 	
2019 Ongoing	NC Department of Agriculture, ECM Implementation
<ul style="list-style-type: none"> Assisted with implementation of Quick Fields Sessions, test solution, and prepared complex workflows. 	
2018 Ongoing	City of Livonia, Laserfiche Document Management System
<ul style="list-style-type: none"> Helped implement new workflow and forms. Integrated Laserfiche system to BS&A (Permitting System), ArcGIS, Inhouse built Planning System, and Office. 	
2017 - 2022	U.S. Department of Commerce, Office of the General Counsel (OGC) Law Firm Document Management System
<ul style="list-style-type: none"> Implemented Laserfiche Solutions and developed Forms, Reports and provided Training as per client's requirement within two separate departments. Worked with clients for Leg Track (Legislative Case Management for Legislative Division), Regulatory Tracking System for Regulatory Division and Interagency Regulatory Review records handling process. 	
2017 Ongoing	City of Southfield, MI Enterprise Content Management Services
<ul style="list-style-type: none"> Developed physical HR forms into electronic forms using Laserfiche Forms System. It includes multilevel reviews and approved workflow. Integrated with Tyler Eden (HR Management System), BS&A (Permitting System), and MS Office. 	
2017 Ongoing	Department of Health and Human Services - Centers of Medicare and Medicaid Services (DHHS-CMS), CMS Laserfiche Maintenance Support
<ul style="list-style-type: none"> Currently supports the processes and policies, supplies business rules and procedures, and communicates the contexts in which the rules, processes and policies are applied. 	

<ul style="list-style-type: none"> Provides input for the design and construction of test cases and scenarios and may also validate executed test results. 	
2017 Ongoing	State of Iowa – Veterans Home (IVH) Laserfiche Document Management System
<ul style="list-style-type: none"> Provided input into and executes user documentation and training material. Tested the product or service towards the end of the project/program (user acceptance testing), using and evaluating it for accuracy and usability, providing feedback to the project team. 	
2016 Ongoing	City of Farmington Hills, MI Records Management Services
<ul style="list-style-type: none"> Provided major software updates/version releases which may include on-site installation, migration, and training. Provided, and remotely applied, minor patches/point releases on an as needed basis. Performed integration with Tyler Eden (HR Management System), BS&A (Permitting System), Office 365, Court Management System. 	
2015 – 2018	Detroit Transportation Corporation – People Mover Enterprise Content Management Services
<ul style="list-style-type: none"> Implemented Laserfiche ECM Solution and developed Workflow, Forms, Reports and provided Training. Providing services for system configuration, user acceptance testing, and training for implementation of software to monitor and track quality variables. Implemented Quick Field for imaging capture solution and provided required Scanning and Record Management services. 	
2014 Ongoing	Howard University, Student Records Management
<ul style="list-style-type: none"> Provided Project Management for the implementation of a Laserfiche system to automate management of student financial aid and academic records. Gathered requirements from the client for their current workflow and designs custom business processes and develops workflows using Laserfiche Workflow Designer 9.1. Captured information from hard paper using regular expressions and attaches the data in the SQL database by using Laserfiche Quick Fields 9.1. 	

Laserfiche Solution Engineer - Rituraj Kumar


Education	BS, Computer Science– Rutgers University									
Laserfiche Certification	Gold	Platinum	Specialist	Admin I	Admin II	Capture I	Capture II	BPM	Repos. Arch	
	★	★	★	★	★	★	★	★	★	
Certifications Licenses	AWS Certified Cloud Practitioner									

Experience Summary	<ul style="list-style-type: none">• Served as a Solution Engineer for several technology implementation projects, including the conversion into new systems. Manages and monitors Laserfiche workflows and troubleshoots any failures. Expert in managing document repositories Laserfiche’s servers and SQL tables. Supports day-to-day maintenance for integrations with other applications of the team members. Implements document digitization projects to automate their manual process of managing and retrieving confidential records.• Utilizing SV2TTS deep learning framework for R&D.• Assisted in security governance and compliance for NYC DOE COVID-19 Emergency Response.• Worked with monitoring systems and tools like Splunk, CloudWatch, etc.• Created to deploy an Elastic Search cluster using Cloud Formation.• Enabled streams and created Lambda function on AWS to trigger changes made in DynamoDB.• Hands-on experience configuring Redshift, Elastic Search, and Dynamo DB with EC2 Instances.• Experienced in AWS Cloud IaaS platform with features EC2, VPC, ELB, Auto-Scaling, Security Groups, Route53, IAM, EBS, AMI, RDS, S3, SNS, SQS, CloudFormation, CloudFront, and Direct Connect.• Has experience with different bug-tracking tools like JIRA.• Experience with DevOps tools such as Git, Docker, Maven, SVN, and Virtual Box.• As part of the continuous delivery Agile team, developed, tested, and deployed platform features. Develop ongoing test automation using a Python-based framework.• Experienced in Branching, Tagging, and maintaining the versions across different SCM tools like GitHub, and Subversion (SVN) on Linux and Windows platforms.			
 Team Experience	GSG Employment	Time with Other Key Employees	Number of Projects Work with Key Employees	
	5 Years	5 Years	+8 Years	
Work History				
2022 Ongoing	-	Georgia Department of Community Health Laserfiche Document Management System		
<ul style="list-style-type: none">• Developer and implemented Intelligent search methods.• Streamlined document distribution and improved accountability with automated workflow routing and notification.				
2019 -2022		Fort Worth Housing Solutions, Texas Electronic Document Management/Workflow Software		
<ul style="list-style-type: none">• Assisted other department engineers in creating practical demonstrations of proposed solutions and demonstrating them to other members of the team.• Established framework necessary contributions from departments to facilitate their collaboration.				

		<ul style="list-style-type: none"> Analyzed current technologies used within Fort Worth Housing Solutions and developed steps and processes for improvement.
2019 Ongoing	-	NC Department of Agriculture ECM Implementation <ul style="list-style-type: none"> Documented and monitored requirements needed to institute proposed updates in relation to customer experience. Worked alongside project management teams to successfully monitor the progress and implementation of initiatives. Accounted for project challenges or constraints and proactively seek to manage challenges.
2017 Ongoing	-	Department of Health and Human Services – Centers of Medicare and Medicaid Services (DHHS-CMS) CMS Laserfiche Maintenance Support <ul style="list-style-type: none"> Designed, implemented, deployed, and supported innovative enterprise content management and business process management solutions to digitally transform their operations. Installed, configured, maintained, and upgraded Laserfiche versions for customer.
2017 Ongoing	-	State of Iowa – Veterans Home (IVH) Laserfiche Document Management System <ul style="list-style-type: none"> Assisted in the development activities of the client requirements, such as electronic forms, workflows, and business processes as needed for the various functional units. Diagnosed, troubleshoot, and resolved system issues.
2017 Ongoing	-	Southfield, Michigan, Enterprise Content Management Services <ul style="list-style-type: none"> Worked closely with Information Technology professionals within Southfield to ensure the hardware is available for projects. Provided detailed specifications for proposed solutions, including the time and scope involved.
2016 Ongoing	-	City of Farmington Hills, MI, Records Management Services <ul style="list-style-type: none"> Worked on the design, implementation, deployment, and support of innovative Enterprise Content Management and Business Process Management solutions to digitally transform their operations. Collaborated with the team to refine in-application diagnostic activities such as error logging, reporting, and consolidate data across Cloud-based services.
2015 - 2018		Detroit Transportation Corporation – People Mover Enterprise Content Management Services <ul style="list-style-type: none"> Designed and installed customized software and hardware solutions for the customer. Tested the performance of the system and fixed bugs.

2014 Ongoing	-	Howard University Student Records Management
<ul style="list-style-type: none"> • Provided unique solutions to manage student records. • Engaged in post-issue analysis to examine incident response performance, identify areas for service improvement, and monitor the progress of implementing recommendations. 		


Business Analyst - Rohit Betwal

Education	BE, Computer Engineering									
Laserfiche Certification	Gold ★	Platinum ★	Specialist ★	Admin I ★	Admin II ★	Capture I ★	Capture II ★	BPM ★	Repos. Arch ★	
Certification and Licenses	Microsoft Office Suite, Microsoft Visio, SQL, Axure RP, Net, SQL Server, jQuery, and Java.									
Experience Summary	<ul style="list-style-type: none">• Nine Laserfiche certifications• BE CE with Five years’ experience.• Project and technical manager on multiple complexes, project based Laserfiche DMS projects.• Assists in determining the business needs creates project design and development activities according to client specifications.• Senior software tester with full system development lifecycle experience									
	Team Experience	GSG Employment		Time with Other Key Employees			Number of Projects Work with Key Employees			
		5 Years		5 Years			5 Years			
Work History										
2021 - Ongoing	State of Tennessee - Higher Education Commission (THEC)Laserfiche Document Management System									
	<ul style="list-style-type: none">• Assisting and guiding businesses in improving processes, products, services, and software through data analysis.• Analyzing the project, designing, and implementing business rules that drive an organization and its operations.									
2018 - Ongoing	National Park Service Laserfiche E-Forms									
	<ul style="list-style-type: none">• Security configuration changes on the operating system, database, and application servers as part of the continuous security monitoring of these systems.• Developing Laserfiche Forms and Migration using Workflow Modules.• Converting the existing physical servers hosting the Laserfiche system to virtual machines utilizing VMWare’s cloning tools. Provides additional technical support if Laserfiche issues are experienced after the VM conversion.									
2017 - Ongoing	Department of Health and Human Services - Centers of Medicare and Medicaid Services (DHHS-CMS)									

	CMS Laserfiche Maintenance Support
	<ul style="list-style-type: none"> • Provided detailed business analysis, outlining problems, planning, and solutions for the project. • Analyzed project, design, and implementation business rules that drive organization and operations.
2017 – Ongoing	U.S. Department of Commerce – Office of General Counsel (DOC-OGC) Laserfiche Legal Document Management System
	<ul style="list-style-type: none"> • Analyzed the structure of the project requirement and identified problems within the project. • Provided guidance on how to solve problems and improve business processes, reports, and workflows for DOC-OGC.
2017 - Ongoing	State of Iowa – Veterans Home (IVH) Laserfiche Document Management System
	<ul style="list-style-type: none"> • Organized, specified, and modeled the requirements to ensure they are complete and unambiguous. • Performing a Business Analyst role including basics of business analysis, analyzing data, workflow, user, or client' inputs, documents, etc.
2017 - Ongoing	Department of Commerce Laserfiche E-Forms
	<ul style="list-style-type: none"> • Designing, documenting, putting into practice, and deploying where necessary, and managing Records Management best practice implementations. • Configured the Content Repositories and Document Types and Object Links. • Unit Testing with Process Owners and their sign off. • Checking of all Master Data migrated from client side. • Documentation of Configuration and user manual. • Configuring repository structure and business processes of Department of Commerce through Laserfiche ECM. • Configuring Laserfiche Rio System. • Configuring Metadata Fields and Templates. • Configuring Users and Security. • Configuring Business Processes.
2016 - 2020	Kirtland Document Management System
	<ul style="list-style-type: none"> • Managed and separated all the documents using Laserfiche Quick Fields and saved them to Laserfiche Repository.
2016 - Ongoing	City of Farmington Hills Laserfiche E-Forms
	<ul style="list-style-type: none"> • Configuration of the Content Repositories and Document Types and linking to Object Links. • Unit Testing with Process Owners and their sign off. • Documentation of Configuration and user manual.

<ul style="list-style-type: none"> Configures repository structure and business processes of City of Farmington Hills through Laserfiche ECM. Upgrades LF RIO from 10 to 10.4 for Production. Prepares LF RIO Development machine. Laserfiche forms for Payroll Change Notice, New Hire, and Termination. Laserfiche forms for Subpoena and PD Complaints. 	
2015 – Ongoing	Howard University Document Management Software
<ul style="list-style-type: none"> Develops numerous on-line forms using Laserfiche Forms and Workflow Modules. 	


Implementation Engineer - Rajiv Oza

Education	MS, Statistics							
Laserfiche Certification	Gold ★	Platinum ★	Specialist ★	Records Manager ★	Capture I ★	Capture II ★	BPM ★	Repos. Arch ★
Certifications and Licenses	Laserfiche Gold and Platinum Certified							
Experience Summary	<ul style="list-style-type: none">Responsible for the design, architecture, installation, integration, and ongoing configuration of new and existing systems delivering first-class software solutions using a combination of out of the box Enterprise software and custom-coded solutions tailored to an organization’s business needs.Managed the technical integration of all Interrelated applications and services.Currently providing maintenance and support for Laserfiche systems for the Cities of Southfield and Livonia and federal government agencies like the Department of Commerce, Department of Army, Department of State, Department of Health and Human Services, United States Marine Corps, and Department of Navy.Evaluated the company's technology solutions to support business operations and processes Worked with our Project Manager on several Laserfiche DMS projects.To Designs and implements innovative solutions.Provides post-implementation support: troubleshooting, maintenance, and training.							
	Team Experience	GSG Employment		Time with Other Key Employees		Number of Projects Work with Key Employees		
		6 Years		6 Years		6 Years		
Work History								
2021 – Ongoing	State of Tennessee – Higher Education Commission (THEC) Laserfiche Document Management System							
<ul style="list-style-type: none">Implemented Laserfiche ECM Solution and develops Workflow, Forms, Reports, and provides training.								

<ul style="list-style-type: none"> • Provided services for system configuration, user acceptance testing, and training for implementation of software to monitor and track quality variables. 	
2019 -2022	Fort Worth Housing Solutions, Texas Electronic Document Management/Workflow Software (Laserfiche)
<ul style="list-style-type: none"> • Worked with a project manager and FWHS implementing complex solutions and workflows. • Collaborated with a team testing all the Laserfiche implementation and coordinated with the workflow developers and project support team to identify business requirements. 	
2019 – Ongoing	NC Department of Agriculture ECM Implementation (Laserfiche)
<ul style="list-style-type: none"> • Helped with implementation of Quick Fields Sessions, test the solution, and prepares complex workflows. • Managed all the responsibilities of test planning. During implementation and development time, tests the system, solves the bugs, and prepares status reports of testing activities. 	
2018 - Ongoing	City of Livonia Document Management Services (Laserfiche)
<ul style="list-style-type: none"> • Installed Laserfiche and is providing Document Management services for multiple departments. • Tested all the workflows and updated the development team. • Coordinated with project manager for all the testing activities and providing reports for all the sections. 	
2017 - Ongoing	City of Southfield Enterprise Content Management (Laserfiche)
<ul style="list-style-type: none"> • Implemented various electronic forms to replace existing HR processes. • Developed physical HR forms into electronic forms using Laserfiche Forms System which included multilevel reviews and approved workflow. The development includes features of Laserfiche: 1) Development of workflow using Business Process Module; 2) Designs web forms using Forms Designer; 3) Creates and updates fillable PDF; and 4) Working with the implementation and development team for all the testing activities and preparing status reports of tested activities. 	
2017 – Ongoing	State of Iowa – Veterans Home (IVH) Laserfiche Document Management System
<ul style="list-style-type: none"> • Implemented projects and installs solutions on the IVH's testing and production environment. • Worked on-site and off-site to diagnose IVH reported problems at diverse levels of solutions (e.g., database, application, network, communication, and integration interface levels). 	
2017 – Ongoing	Department of Health and Human Services, Centers for Medicare and Medicaid Services (DHHS-CMMS), Laserfiche Document Management System
<ul style="list-style-type: none"> • Collaborated with the development team to design latest programs for all DHHS implementation activities and managed all communications with the department to resolve all issues and assists the implementation analyst to manage all data. 	

2016 - Ongoing	City of Farmington Hills Laserfiche Document Management Services <ul style="list-style-type: none"> • Worked as a tester lead for various departments of Farmington Hills. • Managing all the responsibilities of test planning. • Analyzes the necessary resources to execute the testing activities. • Prepared the status report of testing activities.
2015 - 2018	Detroit Transportation Corporation – People Mover ECM Services (Laserfiche) <ul style="list-style-type: none"> • Implemented Laserfiche ECM Solution and developed Workflow, Forms, Reports and provided Training. • Provided services for system configuration, user acceptance testing, and training for implementation of software to monitor and track quality variables. • Implemented Quick Field for imaging capture solution. • Provided required Scanning and Record Management services. • Worked with software developers and project support team and identified business requirements. Designed the test to migrate risk and provided quality assurance.

Support Engineer - Kia Ghiam

Education	MS, Communications									
Laserfiche Certification	Gold ★	Platinum ★	Specialist ★	Admin I ★	Admin II ★	Capture I ★	Capture II ★	BPM ★	Repos. Arch ★	
Certification and Licenses	Laserfiche Gold and Platinum Certified									
Experience Summary	<ul style="list-style-type: none">• Supports clients for the products/services and recommends solutions.• Provides consultant services to guide individual departments in best practices in document management and preparation.• Supports escalating the problem to the right internal team and follows up with them regularly for updates on the progress.• Focuses on problem solving in the short term, responding to tickets, and answering phone calls. Responsible for inbound technical support issues, via telephone, email, and support ticketing system and all issues are documented and resolved ASAP.• Helps in supporting existing customers with troubleshooting on going issues and helps implement various solutions.• Provides access to FTP site where patches may be accessed remotely by remote troubleshooting and repair of errors.									
 Team Experience	GSG Employment			Time with Other Key Employees			Number of Projects Work with Key Employees			
	5 Years			5 Years			5 Years			
Work History										

2021 - Ongoing	State of Tennessee – Higher Education Commission (THEC) Laserfiche Document Management System
<ul style="list-style-type: none"> • Responding to THEC inquiries. • Troubleshooting and solving challenges. • Assists management in creating computer troubleshooting and usage related training materials. 	
2019 – Ongoing	NC Department of Agriculture Electronic Document Management System
<ul style="list-style-type: none"> • Configure various Quick Fields Sessions, test the solution, solve problems, and upgrade system. • Provided guidance to users for features of Laserfiche and functionalities. • Provides remote support and help desk support. 	
2019 – Ongoing	Fort Worth Housing Solutions, Texas Electronic Document Management/Workflow Software
<ul style="list-style-type: none"> • Providing guidance and help to users for specific features of Laserfiche. • Responding to users for their queries in accurate way via call, email, and remotely work with them. 	
2017 - Ongoing	City of Southfield Laserfiche Enterprise Content Management System
<ul style="list-style-type: none"> • Implementing various electronic forms and reports to replace existing HR processes. • Providing training for management workflows, and trains system administrators to develop rights and permissions that protect privacy and personally identifiable information. 	
2016 - Ongoing	City of Farmington Hills ECM and DMS
<ul style="list-style-type: none"> • Gathering requirements and implementing forms to replace existing Personnel Change request process. • Providing training for management workflows, and trains system administrators to develop rights and permissions that protect privacy and personally identifiable information. 	

The following are Laserfiche-certified key staff for the development of forms and workflows using Laserfiche COTS:

Nish Dani – Gold Certified for Overseeing and Communicating



Bhavin Mehta – Platinum Certified – Planning, Implementing and Scripting





Rituraj Kumar – Laserfiche Gold Certified



Rajiv Oza – Platinum Certified – Planning and Documenting



Kia Ghiam – Laserfiche Platinum Certificate



Rohit Betwal – Laserfiche Gold Certificate



Laserfiche Platinum Certificate



C.4.Experience and Technical Qualifications

• Relevant Project Experience

GSG has over ten years has delivered several Laserfiche contracts where we managed the implementation, maintenance, and the support of Laserfiche Systems. Below we have provided a summary of successfully completed Laserfiche jobs that include government, city, state, and commercial projects.

<p>GSG Delivers with Experience</p>	<p>Our team is Experienced.</p> <ul style="list-style-type: none"> • 100% of our team have Laserfiche training and experience. • Over fifty-five Laserfiche contracts. • Have worked together on multiple projects. • Every team member has at least one certification; most have two Laserfiche certifications. • Experience with Government, State, Local, and Commercial. • Laserfiche Partner – Immediate access to technology.
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GSG has a solid and experienced team in place to lead this project. From our managers to the implementation team, all personnel have experience with the implementation and maintenance of Laserfiche products. Our team is led by a Gold Certified Laserfiche Professional, and all team members have Laserfiche training and experience. We have ongoing contracts with several counties and municipal agencies for DMS and other IT projects, including Crystal Lake, IL; Livonia, MI; Farmington Hills, MI; Southfield, MI; Orange County, CA; and several agencies in the City of Detroit. We are providing Laserfiche ECM/RMS services to several city, state, and federal governments.

Some of our major Laserfiche contract highlights:

Federal Laserfiche ECM/DMS Customers

<p>U.S. Department of the Air Force Tyndall Air Force Base</p> <p>Laserfiche Avante</p> <ul style="list-style-type: none"> • GSG is providing Laserfiche Avante Server, Full Named User licenses, renewal of the existing Laserfiche system, and related professional services to Tyndall AFB. • We are also providing data conversion of approximately 60 GB of data records to PDF files. 	<p>U.S. Department of the Air Force FMBIB and SAF/FMFD</p> <p>Laserfiche Software and Maintenance Services</p> <ul style="list-style-type: none"> • GSG provides Laserfiche Software support and maintenance services for archival and retrieval of documents for research, traceability, audibility. • Tasks: Laserfiche Licenses, off-site and on-site support, Laserfiche software upgrades and patches and Technical and Developer Support. Supported systems integrated with Commercial-off-the-Shelf Momentum® software configured for SAFES.
<p>U.S. Dept. of the Army, Redstone Arsenal</p> <p>Software Maintenance Renewal</p> <ul style="list-style-type: none"> • Our team provided Laserfiche Software Maintenance to the Department of Army and provided rapid-response support and maintenance to the Laserfiche system implemented in the Department of Army. • We provided services for RME Enterprise Server, Web Access Enterprise, Laserfiche Full User, Laserfiche Quick Fields, and Import Agent LSAP. 	<p>U.S. Dept. of State, Office of Medical Services</p> <p>Laserfiche Support</p> <ul style="list-style-type: none"> • Our team is providing Laserfiche rapid-response support and maintenance to the Laserfiche system deployed in MED. • We also provide a Laserfiche system to store all medical records that are scanned or electronically converted using the Laserfiche desktop clients.
<p>U.S. Marine Corps</p> <p>Laserfiche Avante Records Management</p>	<p>U.S. Dept. of Commerce Office of the General Counsel</p> <p>Law Firm Document Management System</p>

<ul style="list-style-type: none"> We provided Laserfiche Avante Records Management Edition maintenance and support services. Our services included 0001 Laserfiche Avante Records Management Edition Server for Oracle w/Workflow. 	<ul style="list-style-type: none"> Provided Laserfiche Document Management Application that was customized and configured specifically to meet legal office requirements. Coordinated legislative assignments and corresponding documents, day-to-day Tracking documents into a centralized repository.
U.S. Dept of Health and Human Services Regional Laserfiche Maintenance Support <ul style="list-style-type: none"> We provide Laserfiche software and services, and on-site training for ten regional offices with yearly Records Management Module Training. Provided Laserfiche maintenance renewal software with the Laserfiche Server 2012, and SQL 2012 move and installation. Upgraded to Laserfiche Version 10 and created escalation procedures for problem tickets resolution. 	Department of Interior Replacement of Docket Processing Program <ul style="list-style-type: none"> Replaced the Docket Project Processing Application (DPPA) application with Laserfiche Data Management Software solution used to eliminate any loss or misfiling of documents. Migrating Data into designated fields, testing, setup of Software onto SQL server and any special reporting required by National Park Service (NPS).

City and State Laserfiche ECM/DMS Customers

Georgia Department of Community Health City of Dahlonega, GA Electronic Document Management System <ul style="list-style-type: none"> Implemented a secure Laserfiche Cloud-based Electronic Content Management/Records Management System. Providing licenses, professional services, maintenance, and support services. 	Arizona Department of Administration, State Procurement Office Document Management Services <ul style="list-style-type: none"> GSG provided Document Imaging/Scanning and end-to-end Document Management Services including document creation, storage, maintenance, retention, archival, disposition, etc.
San Bernardino County Transportation Authority, CA Laserfiche System and Product Support <ul style="list-style-type: none"> GSG is providing Laserfiche software support services including renewal of Laserfiche Software Assurance Plan, Training for Laserfiche tools, features/upgrades, and other items, on an as-needed basis consulting service. We provide support on on-site/remote phone/web conferences with screen sharing. 	City of Rancho Cucamonga, California Laserfiche Licenses <ul style="list-style-type: none"> We provided Laserfiche Licensing services to the City of Rancho for Forms Portal, Forms Professional, Laserfiche Server, Avante named user with Web Content, Midsize Public Portal, and Additional Repository.
City of Farmington Hills, Michigan Server and Software Licenses for Laserfiche <ul style="list-style-type: none"> We provided support and maintenance of the Laserfiche system implementation for the City of Farmington Hills, including Workflows, Forms, and other modules, as well as the Premium Laserfiche Software Assurance Plan (LSAP). 	City of Southfield, Michigan Laserfiche Professional Services <i>Development of electronic forms using Laserfiche Forms</i> <ul style="list-style-type: none"> Our team converted physical HR forms into electronic forms using the Laserfiche Forms System, including multilevel review and approved workflow. The development included the below features of Laserfiche: Development of workflow using Process Modeler, design of web forms using Forms Designer, and the creation and updating of fillable PDFs.
Detroit Transportation Corp. – People Mover Document Scanning Software Solution <ul style="list-style-type: none"> GSG provided software and implementation services for licenses and annual support of Laserfiche Workflow and Quick Fields. 	City of Inkster, Michigan Laserfiche Implementation and Support Services <ul style="list-style-type: none"> GSG provides Laserfiche Implementation, Support, licenses, and maintenance services.

- | | |
|---|---|
| <ul style="list-style-type: none"> We provided services for Laserfiche upgrades, patches, and resolution of bugs and other issues. | <ul style="list-style-type: none"> We are storing all data into the Laserfiche repository and provide forms, reports, and workflow as per the City's requirement |
|---|---|

Educational Laserfiche ECM/DMS Customers

Tennessee Higher Education Commission, TN	University of North Carolina
<p>Laserfiche Document Management System</p> <ul style="list-style-type: none"> GSG continues to manage, scan, and index applications and forms filed by postsecondary educational institutions. Providing annual maintenance and support of the Laserfiche Avante Product Suite and modules Providing support in coordination with State of Tennessee's Strategic Technology Solutions (STS) as required and providing optional development and enhancements to the Laserfiche DMS. 	<p>Electronic Document Management System</p> <ul style="list-style-type: none"> GSG provides on-premises based solutions to the University. It includes document management, electronic forms, workflow, and records management implementation and ongoing services. We proposed Laserfiche as a Document Management System to the University. The university is using Laserfiche software as a repository for electronic documents. Primarily the system is used to store and retrieval of design and construction project documents as well as corresponding communications.

Commercial Laserfiche ECM/DMS Customers

National Cooperative Purchasing Alliance
<p>Documents and Records Management</p> <ul style="list-style-type: none"> GSG is a qualified vendor for NCPA Region 14 Education Service Center providing Laserfiche EDRMS services to fulfill NCPA requirements. As part of this contract, GSG is providing Laserfiche licenses, installation, maintenance, support, and training services to the NCPA as well as marketing and administrative support services.

Laserfiche Services Customer Feedback and Related Reference Letters

DHHS – Center for Medicare and Medicaid Services – Laserfiche Rio Consolidation Project



SUMMARY

Excellent

- Quality of work
- Delivery
- Communication
- Project Management

1. Customer Details

Customer Name	U.S. DHHS - Centers for Medicare & Medicaid Services
Project Name	Laserfiche Rio Consolidation Project
Contact Person	Wei Tao
Designation	IT Coordinator
Email Id	Wei.Tao1@cms.hhs.gov
Project Description	Migrate and consolidate the 10 Regional Office (RO) Laserfiche United systems to a centralized system located in the Baltimore Data Center (BDC).

2. Feedback About Global Solutions Group Inc.'s Performance

Ratings: Excellent || Good || Average || Below Average || Poor

	Rating (Place a "Yes" wherever applicable)				
	Excellent	Good	Average	Below Average	Poor
Overall Satisfaction	Yes				
Quality of the Work Performed	Yes				
Delivery on Time	Yes				
Communication and Project Management	Yes				
Things that went well	No any system issue after upgrade done.				
Recognize any outstanding GSG team member(s)	Nishit Dani				
	(Place "X" Where Applicable)				
	Yes	May Be	No		
Will you recommend our services to others?	Yes				
Can we provide your name as a Reference to potential clients?	1.800.562.1963				

3. Any Suggestions/Remarks

GSG has very a very strong technical support team, they be able to resolve all LF related issue and also provide high level system design.

Signature: Wei Tao -S
Digitally signed by Wei Tao -S
Date: 2020.05.06 10:06:19
-06'00'

Name: Wei Tao Date: 05/06/2020

Tyndall Air Force Base – AFCEC – Laserfiche Migration and Upgrade to Version 10.4



1. Customer Details

Customer Name	Tyndall Air Force Base - AFCEC
Project Name	Laserfiche Migration and Upgrade to Version 10.4
Contact Person	Christopher Malott
Designation	AFCEC Tyndall Systems Administrator
Email Id	christopher.malott.2.ctr@us.af.mil
Project Description	Migrated Laserfiche Files from Old Server to new Server and upgrade the version of Laserfiche from 9.0.3 to 10.4.

2. Feedback About Global Solutions Group Inc.'s Performance

Ratings: Excellent || Good || Average || Below Average || Poor

	Rating (Place a "Yes" wherever applicable)				
	Excellent	Good	Average	Below Average	Poor
Overall Satisfaction	X				
Quality of the Work Performed	X				
Delivery on Time	X				
Communication and Project Management	X				
Things that went well	Technician expertly performed the necessary actions to quickly and efficiently restore access to				
Recognize any outstanding GSG team member(s)	Mr. Nishit Dani				
	(Place "X" Where Applicable)				
	Yes	May Be	No		
Will you recommend our services to others?	X				
Can we provide your name as a Reference to potential clients?	X				

3. Any Suggestions/Remarks

N/A

Signature: MALOTT.CHRISTOPHER.
ALLEN.1082962723

Digitally signed by
MALOTT.CHRISTOPHER.ALLEN.1082962723
Date: 2019.10.25 06:45:27 -05'00'

Name: Malott, Christopher A. CTR AFCEC/DSR

Date: 25 October, 2019

SUMMARY

Excellent

- Overall Satisfaction
- Quality of work
- Delivery
- Communication
- Project Management

Universal Load Banks - Laserfiche Rio Enterprise Content Management System



Global Solutions Group
25900 Greenfield Road
Suite 220
Oak Park, MI 48237

248-571-4125
Sales@universalloadbanks.com
www.universalloadbanks.com

SUMMARY

- Very Satisfied
- No loss of sensitive or important data
- Highly recommend GSG

RE: Letter of Reference - Contract for Purchase and Implementation of Laserfiche ECM.

We just wanted to indicate how very satisfied we have been with your product and services provided.

This project required implementation of Laserfiche Rio Enterprise Content Management System and its related Professional Services. Global Solutions Group's (also referred as GSG) implementation team was highly knowledgeable and skilled in their implementation of all Laserfiche products, and the process was done without interfering with ongoing work.

GSG helped developing and implementing a bi-directional integration of Laserfiche with Quick Books (Accounting Software). Which made our tasks of finding vendor invoices easily from Laserfiche and saving statements/documents that are generated into Laserfiche.

Migration of sensitive and important data was a major concern for us, but the detailed processes the GSG team utilized ensured that no data would be lost.

I highly recommend Global Solutions Group for any similar work.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Chirag Mehta', is written over a horizontal line.

Chirag Mehta
Accountant
Universal Load Banks

Universal Load Banks, 28200 Lakeview Drive Wixom, MI 48393 U.S.A.

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U.S. Department of Commerce, Office of the General Counsel (OGC) - Law Firm Document Management System

**Enterprise Small Business (ESB) ETDTDM
Contractor Performance Report (CPR)**
This form is only to be used when CPARS is not available
ESB Prime: / ESB Subcontractor: ESB PRIME

Recent and Relevant Experience: RREP tasks #

For this CPR, were you the Prime or the Subcontractor? Prime

If you were the Prime, please provide the total awarded value. \$ 852,102.80

If you were the Subcontractor, please provide the total value of your portion of the total effort. Not Applicable

CPR Contract Name: Law Firm Document Management System

CPR Contract Number: DOCSS130117CN0019

CPR Contract Scope: GSG has provided Digital transformation services using agile methodology to Department of Commerce. This implementation is customized and configured specifically to meet legal office requirements. We provided legislative assignments and corresponding documents, day-to-day tracking documents into a centralized repository for which we utilized software development agile methodology to Interagency Regulatory Review and Workflow Implementation. Our services include: **Phase 1 Go-Live, Go-Live Implementation Phase 2 Post – Go-Live Support: Post Go Live Operations Support**. We have received a Modification request for this project in the first year. In Modification, we have provided Forms, Business Process (workflow) and migration services for other divisions while migrating U.S. Department of Commerce (DOC), Office of the General Counsel (OGC) data from SharePoint to digital transformation framework. For interagency regulatory review, GSG developed a digital transformation solution using an Agile software development methodology. GSG leveraged the investment OGC made in the digital transforming process and developed a solution to migrate the information from the existing legacy system built on "OGC Docs" to a new digital transformation platform. GSG actively worked with DOC-OGC Federated Delivery Teams (FDT). Together, we have coordinated portfolio management, long-term product roadmap, and release planning, with an emphasis on Agile, test-driven development, and continuous integration and delivery methodologies to assist and enhance efforts to secure new digital applications. We provided support for product and release planning, including analysis, recommendations, and execution to support the continuous delivery and integration of working digital capabilities. Our resources have developed features and provided end-to-end testing of applications on various platforms. GSG has provided guidance and software architectural counsel to DOC-OGC for a highly customized Legal Digital Solution used across various Government agencies. We enhanced the overall digital solution delivery, including easy-to-use web forms, automated business process (workflows), and migration services for other divisions, as we migrated OGC data from legacy system to a highly effective digital transformation framework. The GSG team achieved product delivery per the product plan, with adherence to risk, change and configuration management, successful conversion of the legacy data, digital transformation, modernization and integration of the new application with other department data systems, on-site application training, and knowledge transfer for DOC-OGC administrators and end users. We even provided digital transformation services using Agile methodology to DOC-OGC. This is customized and configured specifically to meet legal office and interagency requirements. We digitally enabled legislative portfolio and corresponding documents, day-to-day tracking documents into a centralized repository with interagency regulatory review and workflow implementation features through Agile methodology for web-based software development process. Automated integration, functional, regression tests. We implemented Continuous Integration / Continuous Delivery (CI/CD) to increase the level of automation in development, testing, release, and deployment.

CPR Contract Type: FFP

CPR Point of Contact Name: Laura Swift

CPR Point of Contact Telephone: 202-482-1610

SUMMARY

Overall Rating Exceptional

- Technical, Cost, Schedule, Management also Exceptional

**Enterprise Small Business (ESB) ETDTDM
Contractor Performance Report (CPR)**
This form is only to be used when CPARS is not available

CPR Point of Contact E-Mail Address: LSwift@doc.gov

**Enterprise Small Business (ESB) ETDTDM
Contractor Performance Report (CPR)**
This form is only to be used when CPARS is not available

(d) Unsatisfactory - 0	Performance does not meet most contractual requirements and recovery is not likely in a timely manner. The contractual performance of the element or sub-element contains a serious problem(s) for which the contractor's corrective actions appear or were ineffective.	To justify an Unsatisfactory rating, identify multiple significant events in each category that the contractor had trouble overcoming and state how it impacted the government. A singular problem, however, could be of such serious magnitude that it alone constitutes an unsatisfactory rating. An Unsatisfactory rating should be supported by referencing the management tools used to notify the contractor of the contractual deficiencies (e.g., management, quality, safety, or environmental deficiency report or letters).
------------------------	--	--

Section I

Please use the value associated with the numbers above for each rating area, then average them to obtain the overall rating (rounded to the nearest whole number).

•Technical	4
•Cost Control	4
•Schedule	4
•Management	4
•OVERALL RATING	4

Comment (if any)

Laserfiche and the related regulatory tracking system have been a great asset to the workflows of OGC. The Project Manager has been extremely involved and helpful in working with our internal OCIO and IT folks during the Authority to Operate certification process and annual recertification. He is consistently responsive and frequently goes above and beyond to ensure the agency's internal milestones are met and the system is functioning as intended.

**Enterprise Small Business (ESB) ETDTDM
Contractor Performance Report (CPR)**
This form is only to be used when CPARS is not available

Rating Definitions (FAR 42.1503 Table 42.1)		
Rating	Definition	Note
(a) Exceptional - 4	Performance meets contractual requirements and exceeds many to the Customer's benefit. The contractual performance of the element or sub-element being evaluated was accomplished with few minor problems for which corrective actions taken by the Contractor were highly effective.	To justify an Exceptional rating, identify multiple significant events and state how they were of benefit to the government. A singular benefit, however, could be of such magnitude that it alone constitutes an Exceptional rating. Also, there should have been NO significant weaknesses identified.
(b) Very Good - 3	Performance meets contractual requirements and exceeds some to the Customer's benefit. The contractual performance of the element or sub-element being evaluated was accomplished with some minor problems for which corrective actions taken by the contractor were effective.	To justify a Very Good rating, identify a significant event and state how it was a benefit to the government. There should have been no significant weaknesses identified.
(c) Satisfactory - 2	Performance meets contractual requirements. The contractual performance of the element or sub-element contains some minor problems for which corrective actions taken by the Contractor appear or were satisfactory.	To justify a Satisfactory rating, there should have been only minor problems, or major problems the contractor recovered from without significant impact to the contract/order. There must have been NO significant weaknesses identified. A fundamental principle of assigning rating is that contractors will not be evaluated with a rating lower than Satisfactory solely for not performing beyond the requirements of the contract/order.
(d) Marginal - 1	Performance does not meet some contractual requirements. The contractual performance of the element or sub-element being evaluated reflects a serious problem for which the contractor has not yet identified corrective actions. The contractor's proposed actions appear only marginally effective or were not fully implemented.	To justify Marginal performance, identify a significant event in each category that the contractor had trouble overcoming and state how it impacted the Government. A Marginal rating should be supported by referencing the management tool that notified the contractor of the contractual deficiency (e.g., management, quality, safety, or environmental deficiency report or letter).

**Enterprise Small Business (ESB) ETDTDM
Contractor Performance Report (CPR)**
This form is only to be used when CPARS is not available

Section II

Signature of Point of Contact:

Date: [Click here to enter a date.](#)

LAURA SWIFT

Digitally signed by LAURA SWIFT
Date: 2023.02.27 11:51:13 -05'00'

C.5.Project References (Attachment B)

D. Cost Proposal

As per requirements, the Cost Proposal has been submitted as a separate file.

E. Submittal Forms

E.1. Attachment A - Proposal Form (Completed and Signed)

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

ATTACHMENT A
(Page 1 of 5)

City of Cooper City, Florida

PROPOSAL FORMS

DOCUMENT MANAGEMENT SYSTEM RFP 2024-4-CC

Proposal Due: Thursday, August 8, 2024

For Information Contact:

The Purchasing Division
Purchasing@cooperCity.gov

Release Date: Friday, July 5, 2024

Submitted by: Global Solutions Group, Inc.

(Company name)

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

ATTACHMENT A

(Page 2 of 5)

Project: DOCUMENT MANAGEMENT SYSTEM
Contract Identification: RFP 2024-4-CC
Proposals submitted to: Office of the City Clerk
City of Cooper City
9090 SW 50 Place
Cooper City, Florida, 33328

1. The undersigned PROPOSER proposes and agrees, if this Bid/Proposal is accepted, to enter into an agreement with City in the form included in the contract documents to perform and furnish all work as specified or indicated in the contract documents for the contract price and within the contract time indicated in this Bid/Proposal and in accordance with the other terms and conditions of the contract documents.
2. Proposer accepts all of the terms and conditions of the advertisement of Request for Proposal and Instruction to Proposers including, without limitation, those dealing with the Bid/Proposal requirements. This Bid/Proposal will remain in full force for one hundred and twenty (120) days from the date of the Bid/Proposal opening. Proposer will sign and submit an agreement with the Bonds and other documents required by the Bidding Requirements within fifteen days after the City's notice of award.
3. In submitting this Bid/Proposal, Proposer represents, as more fully set forth in the Agreement that:
 - a. Proposer has examined copies of all plans, and bidding documents, contract specifications and instruction to proposers.
 - b. Proposer has familiarized itself with the nature and extent of the Contract Documents, work site, locality, local conditions and the laws and regulations that in any manner may affect the cost, progress, performance or furnishing of the work.
 - c. Proposer has studied carefully all reports and drawings of the project and the physical conditions of the project site areas and accepts the extent of the technical data contained in such reports and drawings upon which Proposer is entitled to rely.
 - d. Proposer has correlated the results of his/her studies and reviews, observations, investigations, explorations, tests, and studies with the terms and conditions of the contract documents.
 - e. Proposer has given City written notice of all conflicts, errors or discrepancies that is has discovered in these documents and the written resolution thereof by City is acceptable to Proposer.
 - f. This Bid/Proposal is genuine and not made in the interest of or on behalf of any undisclosed person, firm or corporate and is not submitted in conformity with any agreement or rules of any group, association, organization or corporation; Proposer has not directly or indirectly induced or solicited any other Proposer to submit a false Bid, and Proposer has not sought by collusion to obtain for itself any advantage over any other Proposer or the City.
4. Bid/Proposal Copies
ONE (1) ORIGINAL (UNBOUND) COPY, THREE (3) BOUND PHOTOCOPIES and ONE (1) ELECTRONIC COPY (Flash Drive) of the Proposal should be submitted to the City of Cooper City, City Hall, 9090 SW 50th Place, Cooper City, Florida 33328, to the attention of the Office of the City Clerk.
5. Addenda, Additional Information-Contact Purchasing Division

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

Any addenda or answers to written questions supplied by the City to participating Proposers become part of this Request for Proposal and the resulting contract. The Bid Form shall be signed by an authorized company representative dated and returned with the proposal Bid.

ATTACHMENT A

(Page 3 of 5)

No negotiations, decisions or actions shall be initiated or executed by the Proposer as result of any discussions with any City employee. Only those communications which are in writing from the City may be considered as a duly authorized expression. Also, only communications from proposer that are signed and in writing will be recognized by the City as duly authorized expressions on behalf of the proposer.

Specific questions related to the Scope of Services requested shall be directed in writing to the City of Cooper City - Purchasing Division. Questions must be emailed to Purchasing@coopercity.gov, who may respond in kind with copies to all Proposers. **The deadline for submission of questions is Monday, July 29, 2024 at 3:00 PM (EST).**

The successful proposer shall be required to execute a City contract covering the scope of services to be provided and setting forth the duties, rights and responsibilities of the parties. This contract must be executed by the successful proposer prior to recommendation of award and presentation to the City Commission.

6. Checklist of documents to be included in submittal.

✓	Proposal Form (Completed and Signed)
✓	Reference Form
✓	Public Entity Crimes (PEC) Form
✓	ADA Affidavit
✓	Business Entity Affidavit
✓	Proposer's Foreign (Non-Florida) Corporate Statement (If applicable)
✓	W-9, Request for Taxpayer Identification Number
✓	Proof of Workers Compensation Insurance or Exemption
✓	Proof of Liability Insurance
✓	Ownership Disclosure Affidavit
✓	Drug-Free Workplace Certificate
✓	Employee Background Verification Affidavit
✓	Scrutinized Companies Affidavit
✓	Non-Conflict of Interest Statement
✓	E-Verify Form
✓	Functional/Technical Requirements

ATTACHMENT A

(Page 4 of 5)

Proposer's Contact Information

Name of Company: Global Solutions Group, Inc.

Address: 25900 Greenfield Road, Suite 220
Oak Park, MI 48237

Type of Business: Corporation

Company's Website: www.globalsolgroup.com

Authorized Signatory Contact: Lisa Salvador

Title: Vice President

Tel: 248-291-5440 Mobile: 313-333-0188

Email Address (Required): lisa@globalsolgroup.com

Primary Contact: Lisa Salvador

Title: Vice President

Tel: 248-291-5440 Mobile: 313-333-0188

Email Address (Required): lisa@globalsolgroup.com

Additional Contact & Title: Nish Dani, Project Manager

Tel: 248-291-5440 Mobile: 313-492-0705

Email Address (Required): nishd@globalsolgroup.com

Remit to Address: 25900 Greenfield Road, Suite 220 Oak Park, MI 48237

Remit to Contact: Name: Sahil Shah Tel: 313-482-8278

Remit to Email: sahils@globalsolgroup.com

E.2.Attachment B - Reference Form

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

ATTACHMENT B REFERENCES

All references shall be from entities/companies regularly engaged in the business of providing the goods and/or services as described in this solicitation. **CITY OF COOPER CITY STAFF SHALL NOT BE USED AS A CLIENT REFERENCE.**

1. ENTITY/COMPANY NAME: City of Gainesville, Florida
ADDRESS: 200 E University Avenue, Rm 339 Gainesville, FL 32601
CONTACT NAME & TITLE: Shaneka R. Young , Records Manager
TELEPHONE: 352.334.5015
E-MAIL (REQUIRED): youngsr@cityofgainesville.org
CONTRACT PERIOD: FROM: 2021 TO: 2023

2. ENTITY/COMPANY NAME: Fort Worth Housing Solutions, Texas
ADDRESS: 1201 E. 13th Street Fort Worth, TX 76102
CONTACT NAME & TITLE: Kurt Joye, IT Manager
TELEPHONE: 817-333-3440
E-MAIL (REQUIRED): kjoye@fwhs.org
CONTRACT PERIOD: FROM: 2019 TO: 2024

3. ENTITY/COMPANY NAME: City of Farmington Hills, Michigan
ADDRESS: 31555 W Eleven Mile Rd, Farmington Hills, MI 48336
CONTACT NAME & TITLE: Harry Yee, Senior Information Analyst
TELEPHONE: 248-871-2400
E-MAIL (REQUIRED): hyee@fhgov.com
CONTRACT PERIOD: FROM: 2016 TO: Ongoing

This page shall be completed **IN FULL** and submitted with your bid/proposal.

E.3.Attachment C - Public Entity Crimes (PEC) Form

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

ATTACHMENT C

(Page 1 of 2)

SWORN STATEMENT PURSUANT TO SECTION 287.133 (3) (a), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A
NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to the CITY OF COOPER CITY, FLORIDA

by: Lisa Salvador, Vice President
(print individual's name and title)

for: Global Solutions Group, Inc.
(print name of entity submitting sworn statement)

whose business address is: 25900 Greenfield Road, Suite 220 Oak Park, MI 48237

and (if applicable) its Federal Employer Identification Number (FEIN) is: 200010736

(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: _____ - _____ - _____).

2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentations.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:

- a) A predecessor or successor of a person convicted of a public entity crime; or
- b) An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

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5. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which proposals or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers,

ATTACHMENT C
(Page 2 of 2)

directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

6. Based on information and belief, the statement that I have marked below is true in relation to the entity submitting this sworn statement. (Indicate which statement applies).

X Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, not any affiliate of the entity, has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

____ This entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. (attach a copy of the final order).

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.


Signature

E.4.Attachment D - ADA Affidavit

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

ATTACHMENT D

**AMERICANS WITH DISABILITIES ACT (ADA)
DISABILITY NONDISCRIMINATION STATEMENT**

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL
AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the CITY OF COOPER CITY, FLORIDA

by: Lisa Salvador, Vice President
(print individual's name and title)

for: Global Solutions Group, Inc.
(print name of entity submitting sworn statement)

whose business address is: 25900 Greenfield Road, Suite 220 Oak Park, MI 48237

and (if applicable) its Federal Employer Identification Number (FEIN) is: 200010736
(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: _____ - _____.)

I, being duly first sworn state:

That the above named firm, corporation or organization is in compliance with and agreed to continue to comply with, and assure that any subcontractor, or third party contractor under this project complies with all applicable requirements of the laws listed below including, but not limited to, those provisions pertaining to employment, provision of programs and services, transportation, communications, access to facilities, renovations, and new construction.

The American with Disabilities Act of 1990 (ADA), Pub. L. 101-336, 104 Stat 327, 42 USC 1210112213 and 47 USC Sections 225 and 661 including Title I, Employment; Title II, Public Services; Title III, Public Accommodations and Services Operated by Private entities; Title IV, Telecommunications; and Title V, Miscellaneous Provisions.

The Florida Americans with Disabilities Accessibility Implementation Act of 1993, Section 553.501-553.513, Florida Statutes:

The Rehabilitation Act of 1973, 229 USC Section 794;
The Federal Transit Act, as amended 49 USC Section 1612;
The Fair Housing Act as amended 42 USC Section 3601-3631.


Signature

E.5.Attachment E - Business Entity Affidavit

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

ATTACHMENT E

BUSINESS ENTITY AFFIDAVIT

I, Lisa Salvador, Vice President, being first duly sworn state:

The full legal name and business address of the person(s) or entity proposing to contract or transact business with the City of Cooper City ("City") are (Post Office addresses are not acceptable), as follows:

200010736
Federal Employer Identification Number (FEIN) (If none, Social Security Number)

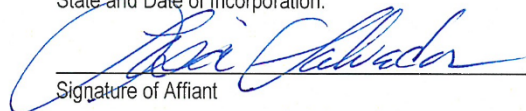
Global Solutions Group, Inc.
Name of Entity, Individual, Partners or Corporation

Doing Business As (If same as above, leave blank)

<u>25900 Greenfield Road, Suite 220</u>	<u>Oak Park</u>	<u>Michigan 48237</u>
Street Address	City	State

State: Michigan / Date: August 06, 2024

State and Date of Incorporation:


Signature of Affiant

August 06, 2024
Date

Lisa Salvador, Vice President
Print Name

August 06, 2024
Date

E.6.Attachment F - Proposer's Foreign (Non-Florida) Corporate Statement (If applicable)

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

ATTACHMENT F

FOREIGN (NON-FLORIDA) CORPORATION MUST COMPLETE THIS FORM
DEPARTMENT OF STATE CORPORATE CHARTER NO. F21000000821

If your corporation is exempt from the requirements of Section 607.1501, Florida Statutes, **YOU MUST CHECK BELOW** the reason(s) for the exemption. Please contact the Department of State, Division of Corporations at (850) 245-6051 for assistance with corporate registration or exemptions. 607.1501 Authority of foreign corporation to transact business required.


- (1) A foreign corporation may not transact business in this state until it obtains a certificate of authority from the Department of State.
- (2) The following activities, among others, do not constitute transacting business within the meaning of subsection one (1):
- ☐ (a) Maintaining, defending, or settling any proceedings.
 - ☐ (b) Holding meetings of the board of directors or shareholders or carrying on other activities concerning internal corporate affairs.
 - ☐ (c) Maintaining bank accounts.
 - ☐ (d) Maintaining officers of agencies for the transfer, exchange, and registration of the corporation's own securities or maintaining trustees or depositories with respect to those securities.
 - ☐ (e) Selling through independent contractors.
 - ☐ (f) Soliciting or obtaining orders, whether by mail or through employees, agents or otherwise, if the orders
 - ☐ (g) Creating or acquiring indebtedness, mortgages, and security interests in real or personal property.
 - ☐ (h) Securing or collecting debts or enforcing mortgages and security interests in property securing the debts.
 - ☐ (i) Transacting business in interstate commerce.
 - ☐ (j) Conducting an isolated transaction that is completed within 30 days and that is not one in the course of repeated transactions of a like nature.
 - ☐ (k) Owning and controlling a subsidiary corporation incorporated in or transacting business within this state or voting the stock of any corporation which it has lawfully acquired.
 - ☐ (l) Owning a limited partnership interest in a limited partnership that is doing business within this state, unless such limited partner manages or controls the partnership or exercises the powers and duties of a general partner.
 - ☐ (m) Owning, without more, real or personal property.
- (3) This section has no application to the question of whether any foreign corporation is subject to service of process and suit in this state under any law of this state.

The list of activities of subsection (2) is not exhaustive.

Please check one of the following if your firm is NOT a corporation:

- (I) ☐ Partnership, Joint Venture, Estate or Trust
(II) ☐ Sole Proprieties of Self Employed

NOTE: This sheet **MUST** be enclosed with your bid if you claim an exemption or have checked I or II above, your firm will be considered a corporation and subject to all requirements listed herein.


SIGNATURE OF AUTHORIZED AGENT OF PROPOSER

Global Solutions Group, Inc.
PROPOSER'S LEGAL NAME

E.7.Attachment G - W-9, Request for Taxpayer Identification Number

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

Attachment G

Form W-9 (Rev. October 2015) Department of the Treasury Internal Revenue Service		Request for Taxpayer Identification Number and Certification ▶ Go to www.irs.gov/FormW9 for instructions and the latest information.		Give Form to the requester. Do not send to the IRS.
1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Global Solutions Group, Inc.				
2 Business name/disregarded entity name, if different from above				
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.				
<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C-C corporation, S-S corporation, P-Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ▶ _____				
4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 1): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ (Apply to accounts maintained outside the U.S.)				
5 Address (number, street, and apt. or suite no.) See instructions. 25900 Greenfield Road, Suite 220 Oak Park, MI 48237				
6 City, state, and ZIP code				
7 List account number(s) here (optional):				
Part I Taxpayer Identification Number (TIN) Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later. Note: If the account is in more than one name, see the instructions for line 1. Also see <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.				
Part II Certification Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined below); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct. Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.				
Social security number _____ - _____ - _____ or Employer identification number 20 - 0010736				
Sign Here Signature of U.S. person ▶ <i>[Signature]</i> Date ▶ August 06, 2024				
General Instructions Section references are to the Internal Revenue Code unless otherwise noted. Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9 . Purpose of Form An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following: • Form 1099-DIV (dividends, including those from stocks or mutual funds) • Form 1099-MISC (various types of income, prizes, awards, or gross proceeds) • Form 1099-B (stock or mutual fund sales and certain other transactions by brokers) • Form 1099-S (proceeds from real estate transactions) • Form 1099-K (merchant card and third party network transactions) • Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition) • Form 1099-C (canceled debt) • Form 1099-A (acquisition or abandonment of secured property) Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN. If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See <i>What is backup withholding</i> , later.				

Cat. No. 10221X

Form **W-9** (Rev. 10-2015)

E.8.Attachment H - Proof of Workers Compensation Insurance or Exemption

Workers Compensation

ACORD®		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 10/04/2023			
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.							
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).							
PRODUCER AUTOMATIC DATA PROCESSING INS AGCY 76250874 1 ADP BLVD M/S 625 ROSELAND NJ 07068		CONTACT NAME: PHONE (800) 524-7024 (A/C, No, Ext): FAX (A/C, No): E-MAIL ADDRESS: INSURER(S) AFFORDING COVERAGE INSURER A : Hartford Fire and Its P&C Affiliates INSURER B : INSURER C : INSURER D : INSURER E : INSURER F :					
INSURED GLOBAL SOLUTIONS GROUP, INC. 25900 GREENFIELD RD STE 220 OAK PARK MI 48237-1267		NAIC# 00914					
COVERAGES		CERTIFICATE NUMBER:		REVISION NUMBER:			
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.							
INSR LTR	TYPE OF INSURANCE	ADOL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/Y YYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COM/OP AGG
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS <input type="checkbox"/> HIRE AUTOS						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)
	UMBRELLA LIAB EXCESS LIAB <input type="checkbox"/> OCCUR CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE AGGREGATE
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	76 WEG AT2LHG	07/18/2023	07/18/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE -EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Those usual to the Insured's Operations.							
CERTIFICATE HOLDER				CANCELLATION			
				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.			
				AUTHORIZED REPRESENTATIVE <i>Susan S. Castaneda</i>			

E.9.Proof of Liability Insurance

General and Professional Insurance

ACORD®		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 2/9/2024															
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</p>																			
PRODUCER Michigan Community Insurance Agency Inc. 49357 Pontiac Trail Ste 101 PO Box 930599 Wixom MI 48393-0599			CONTACT NAME: Beverly Marshall PHONE (A/C, No, Ext): (248) 679-7000 FAX (A/C, No): (248) 906-5959 E-MAIL: certificate@MichiganCommunity.com ADDRESS:																
INSURED Global Solutions Group Inc 25900 Greenfield Rd Ste 220 Suite 220 Oak Park MI 48237-1267			<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: Hartford Underwriters Insuranc</td> <td>30104</td> </tr> <tr> <td>INSURER B: Hartford Fire Insurance</td> <td>19682</td> </tr> <tr> <td>INSURER C: Crum & Forster</td> <td>44520</td> </tr> <tr> <td>INSURER D: Houston Casualty</td> <td>25054</td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </tbody> </table>			INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Hartford Underwriters Insuranc	30104	INSURER B: Hartford Fire Insurance	19682	INSURER C: Crum & Forster	44520	INSURER D: Houston Casualty	25054	INSURER E:		INSURER F:	
INSURER(S) AFFORDING COVERAGE	NAIC #																		
INSURER A: Hartford Underwriters Insuranc	30104																		
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INSURER C: Crum & Forster	44520																		
INSURER D: Houston Casualty	25054																		
INSURER E:																			
INSURER F:																			
COVERAGES CERTIFICATE NUMBER: 2024/25 GL RNO UM EO CR REVISION NUMBER:																			
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>																			
INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS												
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER			35SBAAV7LG4	02/09/2024	02/09/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Per occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COM/OP AGG \$ 2,000,000												
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			35SBAAV7LG4	02/09/2024	02/09/2025	COMBINED SINGLE LIMIT (Per accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$												
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			35SBAAV7LG4	02/09/2024	02/09/2025	EACH OCCURRENCE \$ 6,000,000 AGGREGATE \$ 6,000,000 \$												
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E L EACH ACCIDENT \$ E L DISEASE - EA EMPLOYEE \$ E L DISEASE - POLICY LIMIT \$												
C	Technology E&O / Cyber			TCH103108 / R23TES20337	04/11/2023	04/11/2024	Occurrence / Aggregate 5,000,000												
B	Crime			35SDCHN7361	04/11/2023	04/11/2024	Employee Dishonesty 5,000,000												
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)																			
CERTIFICATE HOLDER				CANCELLATION															
				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.															
				AUTHORIZED REPRESENTATIVE Pamela J Lange															

E.10. Attachment I - Ownership Disclosure Affidavit

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

**ATTACHMENT I
OWNERSHIP DISCLOSURE AFFIDAVIT**

1. If the contact or business transaction is with a corporation, the full legal name and business address shall be provided for each officer and director and each stockholder who holds directly or indirectly five percent (5%) or more of the corporation's stock. If the contract or business transaction is with a trust, the full legal name and address shall be provided for each trustee and each beneficiary. All such names and addresses are (Post Office addresses are not acceptable), as follows:

Full Legal Name	Address	Ownership
Bijal Mehta	29468 Chelsea Crossing Farmington Hills MI 48331	100 %
		%
		%

2. The full legal names and business address of any other individual (other than subcontractors, materialmen, suppliers, laborers, or lenders) who have, or will have, any interest (legal, equitable, beneficial or otherwise) in the contract or business transaction with the City are (Post Office addresses are not acceptable), as follows:



Signature of Affiant

Lisa Salvador, Vice President

Print Name

August 06, 2024

Date

E.11. Attachment J - Drug-Free Workplace Certificate

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

ATTACHMENT J

DRUG FREE WORKPLACE CERTIFICATE

I, the undersigned, in accordance with Florida Statute 287.087, hereby certify that, (**print or type name of firm**)

Global Solutions Group, Inc.

1. Publishes a written statement notifying that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace named above, and specifying actions that will be taken against violations of such prohibition.
2. Informs employees about the dangers of drug abuse in the work place, the firm's policy of maintaining a drug free working environment, and available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug use violations.
3. Gives each employee engaged in providing commodities or contractual services that are under bid or proposal, a copy of the statement specified above.
4. Notifies the employees that as a condition of working on the commodities or contractual services that are under bid or proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, pleas of guilty or nolo contendere to, any violation of Chapter 1893, or of any controlled substance law of the State of Florida or the United States, for a violation occurring in the work place, no later than THREE (3) days after such conviction, and requires employees to sign copies of such written (*) statement to acknowledge their receipt.
5. Imposes a sanction on, or requires the satisfactory participation in, a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
6. Makes a good faith effort to continue to maintain a drug free work place through the implementation of the drug free workplace program.

"As a person authorized to sign this statement, I certify that the above named business, firm or corporation complies fully with the requirements set forth herein".


Signature of Affiant

Lisa Salvador, Vice President

Print Name

August 06, 2024

Date

E.12. Attachment K - Employee Background Verification Affidavit

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

ATTACHMENT K

EMPLOYEE BACKGROUND VERIFICATION AFFIDAVIT

I, Lisa Salvador of Global Solutions Group, Inc., attest that all personnel used in
(Print Name) (Company Name)

the performance of this work have had a criminal background check with a passing grade and have been drug tested with a passing grade and are legally documented to work in the United States.



Signature of Affiant

Lisa Salvador, Vice President

Print Name

August 06, 2024

Date

E.13. Attachment L - Scrutinized Companies Affidavit

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

ATTACHMENT L

Scrutinized Companies Affidavit
CERTIFICATION PURSUANT TO FLORIDA STATUTE § 287.135

I, Lisa Salvador, Vice President, on behalf of, Global Solutions Group, Inc.

Print Name and Title

Company Name

certify that Global Solutions Group, Inc. does not:

Company Name

1. Participate in a boycott of Israel; and
2. Is not on the Scrutinized Companies that Boycott Israel List; and
3. Is not on the Scrutinized Companies with Activities in Sudan List; and
4. Is not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List; and
5. Has not engaged in business operations in Syria.

Submitting a false certification shall be deemed a material breach of contract. The City shall provide notice, in writing, to the Contractor of the City's determination concerning the false certification. The Contractor shall have ninety (90) days following receipt of the notice to respond in writing and demonstrate that the determination of false certification was made in error. If the Contractor does not demonstrate that the City's determination of false certification was made in error then the City shall have the right to terminate the contract and seek civil remedies pursuant to Florida Statute § 287.135.

Section 287.135, Florida Statutes, prohibits the City from: 1) Contracting with companies for goods or services in any amount if at the time of bidding on, submitting a proposal for, or entering into or renewing a contract if the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, F.S. or is engaged in a boycott of Israel; and

2) Contracting with companies, for goods or services over \$1,000,000.00 that are on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector List, created pursuant to s. 215.473, or are engaged in business operations in Syria.

As the person authorized to sign on behalf of the Contractor, I hereby certify that the company identified above in the section entitled "Contractor Name" does not participate in any boycott of Israel, is not listed on the Scrutinized Companies that Boycott Israel List, is not listed on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector List, and is not engaged in business operations in Syria. I understand that pursuant to section 287.135, Florida Statutes, the submission of a false certification may subject the company to civil penalties, attorney's fees, and/or costs. I further understand that any contract with the City for goods or services may be terminated at the option of the City if the company is found to have submitted a false certification or has been placed on the Scrutinized Companies with Activities in Sudan list or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

Global Solutions Group, Inc.

COMPANY NAME

Lisa Salvador, Vice President

PRINT NAME & TITLE


SIGNATURE

E.14. Attachment M - Non-Conflict of Interest Statement

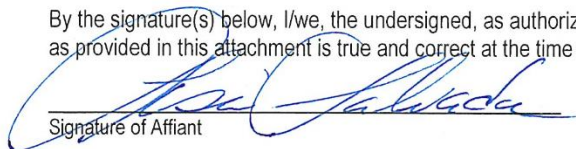
RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

ATTACHMENT M

NON-CONFLICT OF INTEREST STATEMENT

1. A. I am the Vice President of Global Solutions Group, Inc. with a
[Insert Title] [Insert Company Name]
 - a. local office in 25900 Greenfield Road, Suite 220 Oak Park, MI 48237 and
principal office in Michigan.
2. The entity hereby submits a proposal/offer in response to RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM.
3. The AFFIANT has made diligent inquiry and provided the information in this statement affidavit based upon its full knowledge.
4. The AFFIANT states that only one submittal for this solicitation has been submitted and tendered by the appropriate date and time and that said above stated entity has no financial interest in other entities submitting a proposal for the work contemplated hereby.
5. Neither the AFFIANT nor the above named entity has directly or indirectly entered into any agreement, participated in any collusion or collusive activity, or otherwise taken any action which in any way restricts or restrains the competitive nature of this solicitation, including but not limited to the prior discussion of terms, conditions, pricing, or other offer parameters required by this solicitation.
6. Neither the entity nor its affiliates, nor anyone associated with them, is presently suspended or otherwise prohibited from participation in this solicitation or any contract to follow thereafter by any government entity.
7. Neither the entity nor its affiliates, nor anyone associated with them, have any potential conflict of interest because and due to any other clients, contracts, or property interests in this solicitation or the resulting project.
8. I hereby also certify that no member of the entity's ownership or management or staff has a vested interest in any City Division/Department/Office.
9. I certify that no member of the entity's ownership or management is presently applying, actively seeking, or has been selected for an elected position within City of Cooper City government.
10. In the event that a conflict of interest is identified in the provision of services, I, the undersigned, will immediately notify the City in writing.

By the signature(s) below, I/we, the undersigned, as authorized signatory to commit the firm, certify that the information as provided in this attachment is true and correct at the time of submission.



Signature of Affiant

Lisa Salvador, Vice President

Printed Name & Title of Affiant

E.15. Attachment N - E-Verify Form

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

ATTACHMENT N
(Page 1 of 2)

E-VERIFY FORM UNDER SECTION 448.095, FLORIDA STATUTES
TO BE RETURNED WITH PROPOSAL

Project Name:	Document Management System
Project No.:	RFP-2024-4-CC-0-2024/BD

1. Definitions:

"Contractor" means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration. "Contractor" includes, but is not limited to, a vendor or consultant.

"Subcontractor" means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration.

"E-Verify system" means an Internet-based system operated by the United States Department of Homeland Security that allows participating employers to electronically verify the employment eligibility of newly hired employees.

2. Effective January 1, 2021, Contractors, shall register with and use the E-verify system in order to verify the work authorization status of all newly hired employees. Contractor shall register for and utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

- a) All persons employed by a Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub vendors/subconsultants/subcontractors) assigned by Contractor to perform work pursuant to the contract with the City of Cooper City. The Contractor acknowledges and agrees that registration and use of the U.S. Department of Homeland Security's E-Verify System during the term of the contract is a condition of the contract with the City of Cooper City; and
- c) Should vendor become the successful Contractor awarded for the above-named project, by entering into the contract, the Contractor shall comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes, but is not limited to registration and utilization of the E-Verify System to verify the work authorization status of all newly hired employees. Contractor shall also require all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The Contractor shall maintain a copy of such affidavit for the duration of the contract.

3. Contract Termination

RFP 2024-4-CC | DOCUMENT MANAGEMENT SYSTEM

a) If the City has a good faith belief that a person or entity with which it is contracting has knowingly violated s. 448.09 (1) Fla. Stat., the contract shall be terminated.


ATTACHMENT N
(Page 2 of 2)

b) If the City has a good faith belief that a subcontractor knowingly violated s. 448.095 (2), but the Contractor otherwise complied with s. 448.095 (2) Fla. Stat., shall promptly notify the Contractor and order the Contractor to immediately terminate the contract with the subcontractor.

c) A contract terminated under subparagraph a) or b) is not a breach of contract and may not be considered as such.

d) Any challenge to termination under this provision must be filed in the Circuit Court no later than 20 calendar days after the date of termination.

e) If the contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination.

Company Name: Global Solutions Group, Inc.
Authorized Signature: 
Print Name: Lisa Salvador
Title Vice President
Date: August 06, 2024
Phone: 248-291-5440

E.16. Attachment O – Functional Technical Requirements

Attachment O – Functional Technical Requirements has been included as an Excel file on the thumb drives submitted with this proposal.

Capture	Meets This Requirement	Comments
Does the product work with a wide variety of scanners?	Yes	Laserfiche supports virtually all ISIS and TWAIN scanners, as well as an interface for Kofax VRS. For a list of compatible scanners, please see http://www.laserfiche.com/en-us/Scanner .
Are you able to capture images already stored on your computer or network folders and process them as you would scan images—including basic image enhancement, OCR and metadata?	Yes	Laserfiche Import Agent can monitor any number of folders on a network, and automatically import any images that appear in those folders. Laserfiche supports full text searching within documents that have been OCR. Laserfiche capture tools have options to improve the document in many ways including image enhancements such as despeckling or deskewing the document, OCR (including Zone OCR), Barcode reading, auto-redaction, automatic field population, blank page removal, and many more.
Does the system auto-name documents while scanning according to user, date or field values?	Yes	Laserfiche can auto-name documents during scanning based on user, date, or field values using its Auto-naming Rules feature
Can you scan additional pages into existing documents?	Yes	Out of the Box Functionality
Can you perform image adjustments to remove noise, remove lines, crop, rotate and perform other image clean-up?	Yes	Laserfiche provides image adjustments like removing noise, lines, cropping, and rotating through its Laserfiche Document Imaging tools
Does the system automatically remove blank pages?	Yes	Laserfiche can automatically remove blank pages using its Document Processing feature.
Can you archive electronic documents including images, text, spreadsheets, PDFs, movies, AutoCAD and	Yes	Laserfiche can archive electronic documents including images, text, spreadsheets, PDFs, movies, AutoCAD, and sound files in their native formats using its Document Management capabilities.

Capture	Meets This Requirement	Comments
sound files in their native file formats?		
Can you send documents to the system from Windows® Explorer™?	Yes	You can import documents and folders using the Import command in the Laserfiche Windows client and the Laserfiche web client, which will open the full Import dialog box.
Can you save directly from Microsoft® Office such as Word, Excel and PowerPoint?	Yes	Laserfiche supports out of box integration with Microsoft Office, which can directly save the documents to the system from windows explorer.
Can you store directly from Outlook and automatically map the email's metadata to your fields?	Yes	Laserfiche has a built in Outlook integration and supports which allows automatically map the email's metadata
Can you automatically create TIFF images from PDF documents?	Yes	Yes, Laserfiche allows generating TIFF images from PDFs during import, potentially with compression options.
Does the system support mandatory metadata acquisition?	Yes	Laserfiche supports mandatory metadata acquisition through its Document Metadata Fields feature.
Can you import electronic documents and directories by dragging and dropping?	Yes	You/Users can import electronic documents and directories by dragging and dropping using the Laserfiche Desktop or Laserfiche Web Access interface.
Can you export and import documents, folders, annotations and their metadata?	Yes	Users/You can export and import documents, folders, annotations, and their metadata using Laserfiche Repository Export and Import Agent features.
Can you convert electronic documents to archival images without printing and scanning them?	Yes	User/You can convert electronic documents to archival images without printing and scanning using Laserfiche Quick Fields or Laserfiche Document Imaging.
Can you extract text from electronic documents?	Yes	Yes, You/User can extract text from electronic documents using Laserfiche OCR (Optical Character Recognition).

Capture	Meets This Requirement	Comments
Can you create new folders directly from the Import dialog?	Yes	You/user can create new folders directly from the Import dialog using Laserfiche Import Agent or Laserfiche Web Access.
Is there Unicode support to handle documents in non-English languages?	Yes	Laserfiche provides Unicode support through its Document Management System and Metadata Fields to handle documents in non-English languages.
Is there form alignment and dropout for precise zone OCR?	Yes	Yes, Laserfiche provides form alignment and dropout features for precise zone OCR through Laserfiche Quick Fields and Laserfiche Document Imaging.
Can you extract template and identification data from images?	Yes	You/Users can extract template and identification data from images using Laserfiche Quick Fields or Laserfiche Forms.
Can you extract data by OCR, zone OCR, bar code recognition or Optical Mark Recognition (OMR)?	Yes	Yes, Laserfiche supports data extraction through OCR, zone OCR, bar code recognition, and Optical Mark Recognition (OMR) using Laserfiche Quick Fields.
Can you query an external database based on a unique value to minimize data entry?	Yes	You/Users can query an external database based on a unique value to minimize data entry using Laserfiche Forms with Data Integration capabilities.
Can you use extracted data for document or folder naming, indexing or as input to other processes?	Yes	Yes, extracted data can be used for document or folder naming, indexing, or as input to other processes using Laserfiche Quick Fields for extraction and Laserfiche Workflow for automation.
Does the system identify documents by recognizing forms or by matching extracted data?	Yes	Laserfiche system identifies documents by recognizing forms or by matching extracted data using Laserfiche Quick Fields and Laserfiche Forms.
Does the system use identification for document separation or individualized processing?	Yes	Laserfiche uses identification for document separation or individualized processing through Laserfiche Quick Fields for automated document separation and Laserfiche Workflow for individualized processing.

Capture	Meets This Requirement	Comments
Can you imprint images with Bates numbers, lookup data or bitmaps?	Yes	Users can imprint images with Bates numbers, lookup data, or bitmaps using Laserfiche Document Imaging.
Can you schedule document uploading to the repository?	Yes	You/User can schedule document uploading to the repository using Laserfiche Import Agent.
Can you start a scanning session automatically?	Yes	You/User can start a scanning session automatically using Laserfiche Quick Fields with its scheduled or event-triggered scanning capabilities.
Can you set security on your scanning sessions to prevent any changes?	Yes	Laserfiche can set security on scanning sessions to prevent changes using Laserfiche Quick Fields with its security and access control settings.
Can you automatically redact specific patterns on the document, such as social security numbers, regardless of location?	Yes	Yes, You/Users can automatically redact specific patterns, such as social security numbers, regardless of location using Laserfiche Quick Fields with its Redaction capabilities.
Can you highlight, stamp or place a sticky note on the document upon scan?	Yes	Laserfiche can highlight, stamp, or place a sticky note on documents upon scan using Laserfiche Document Imaging.
Can you capture content from a third party application via hot folder?	Yes	Laserfiche captures content from a third-party application via hot folder using Laserfiche Import Agent.
Indexing	Meets This Requirement	Comments
Does the system support field values on any document or folder?	Yes	Laserfiche system supports field values on any document or folder using Laserfiche Metadata and Document Fields
Can you create different templates for distinct document types?	Yes	Laserfiche can create different templates for distinct document types using Laserfiche Metadata Templates.

Capture	Meets This Requirement	Comments
Are there constraints forcing users to enter field information in specified formats?	Yes	Laserfiche Metadata Templates allow you to set constraints to enforce specific formats for field information.
Is there color-coding to distinguish document types?	Yes	Laserfiche allows color-coding to distinguish document types through its Custom Metadata and Folder Views features.
Can you reassign or update templates or fields at any time?	Yes	Laserfiche can reassign or update templates or fields at any time using Laserfiche Administration and Metadata Management features.
Are selection lists available to standardize template entries?	Yes	Laserfiche Metadata Templates provide selection lists to standardize template entries.
Can you auto populate template information to documents from parent folders?	Yes	You/User can auto-populate template information to documents from parent folders using Laserfiche Metadata Inheritance.
Does the program support simultaneous OCR from multiple workstations?	Yes	Laserfiche supports simultaneous OCR from multiple workstations using Laserfiche Document Imaging with networked OCR processing capabilities.
How many languages are supported by the OCR?	Yes	Laserfiche OCR supports over 60 languages.
Does the system support multi-tier, dynamic fields? For example, field "City" displays values based on the "State" field chosen.	Yes	Laserfiche supports multi-tier, dynamic fields where the values in one field, such as "City," are dependent on the selection in another field, such as "State," using Laserfiche Forms with Dynamic Field Rules.
Can you pull a field list from a database?	Yes	Laserfiche can pull a field list from a database using Laserfiche Forms with Database Integration.
Can you use tokens to auto populate information on the field?	Yes	User/You can use tokens to auto-populate information in fields using Laserfiche Forms with its Token-Based Field Population feature.
Can the system automatically populate field values from a database based on a key field value?	Yes	Laserfiche system can automatically populate field values from a database based on a key field value using Laserfiche Forms with Database Lookups.

Capture	Meets This Requirement	Comments
Can you mark fields as required?	Yes	User/You can mark fields as required using Laserfiche Forms by setting Field Validation Rules.
Can you create comment fields and automatically insert the username, date and time after a comment is inserted?	Yes	User/You can create comment fields and automatically insert the username, date, and time using Laserfiche Forms with Form Field Rules and Audit Fields.
Can a field be marked as a multi-value field?	Yes	Fields can be marked as multi-value fields in Laserfiche Forms to allow for multiple entries or selections.
Search and Retrieval	Meets This Requirement	Comments
Are template field searches supported?	Yes	Laserfiche supports template field searches, allowing users to search for documents based on metadata fields defined in templates.
Do full-text searches cover the entire repository?	Yes	Full-text searches cover the entire repository in Laserfiche, allowing for comprehensive searches across all indexed content.
Are fuzzy searches supported?	Yes	Laserfiche provide advanced full text search capabilities that include fuzzy, inflectional, thesaurus, proximity, wild card, and SOUNDEX.
Can you automatically perform the most commonly used searches (text, field, annotation and name), as well as custom searches, from a Google-style toolbar?	Not Available	User/You can automatically perform commonly used searches (text, field, annotation, and name) as well as custom searches using the Laserfiche Web Access or Laserfiche Desktop interface with its Search Toolbar.
Can you search by tags, volume, creation or modification date, note text, versions, comments or other criteria?	Yes	Laserfiche allows you to search by tags, volume, creation or modification date, note text, versions, comments, and other criteria using its Advanced Search and Search Filters features.
Can you save search criteria for repeated execution?	Yes	User/You can save search criteria for repeated execution using Laserfiche with the Saved Searches feature.

Capture	Meets This Requirement	Comments
Are proximity searches supported?	Yes	Laserfiche supports proximity searches, allowing you to find terms that are close to each other within a specified distance.
Can you perform name searches by document or folder?	Yes	User/You can perform name searches by document or folder using Laserfiche's Advanced Search capabilities.
Can you combine search criteria to narrow results (Boolean searching)?	Yes	User/You can combine search criteria to narrow results using Boolean operators in Laserfiche's Advanced Search feature.
Can you limit search results by folder?	Yes	Yes, You/User can limit search results by folder using Laserfiche's Advanced Search feature.
Are search terms highlighted to show their precise location within returned documents?	Yes	Yes, search terms are highlighted to show their precise location within returned documents using Laserfiche's Search Results Viewer.
Can you save search results in folders for quick reference and easy access?	Yes	Users/You can save search results in folders for quick reference and easy access using Laserfiche's Saved Searches and Document Management features.
Is there a line of context display to show how the word or phrase is used without needing to open the entire document?	Yes	Laserfiche provides a line of context display, known as Snippet View, to show how the word or phrase is used without needing to open the entire document.
Can you share a search via a URL?	Yes	You/User can share a search via a URL using Laserfiche's Web Access or Laserfiche Cloud, which allows you to generate and share links to specific searches.
Can you set up a Public Facing Portal to allow the public to search for files using their web browser?	Yes	You/User can set up a Public Facing Portal using Laserfiche Web Access or Laserfiche Cloud to allow the public to search for files using their web browser.
Distribution	Meets This Requirement	Comments
Does the software offer a flexible print configuration?	Yes	Laserfiche offers flexible print configuration options through Laserfiche Print Manager and Document Services.
Is there accurate scaling of print output to match the original document?	Yes	Laserfiche provides accurate scaling of print output to match the original document using its Laserfiche Print Manager.

Capture	Meets This Requirement	Comments
Can you e-mail images as TIFF or PDF?	Yes	You/Users can email images as TIFF or PDF using Laserfiche's Export and Email features.
Is cross-platform retrieval with standard Web browsers supported?	Yes	Yes, cross-platform retrieval with standard web browsers is supported using Laserfiche Web Access.
Are mobile users supported with apps for smartphones and tablets?	Yes	Laserfiche supports mobile access and tasks through its Laserfiche Mobile app.
Can you distribute and archive records on non-erasable media?	Yes	Laserfiche allows for the distribution and archiving of records on non-erasable media, such as WORM (Write Once, Read Many) drives or similar storage solutions.
Does the system provide a full-featured browser-based client (thin client)?	Yes	Laserfiche provides a full-featured browser-based client through Laserfiche Web Access
Can you create published repositories based on search results?	Yes	You/Users can create published repositories based on search results using Laserfiche Web Access or Laserfiche Cloud.
Secure, trackable document sharing, with options to secure shared documents with a password or set sharing to expire on specific dates.	Yes	Laserfiche supports secure, trackable document sharing with options to secure shared documents with a password and set sharing to expire on specific dates using its Laserfiche Cloud or Laserfiche Web Access features.
Can you share documents using shortcuts or URLs?	Yes	You/User can share documents using shortcuts or URLs with Laserfiche Web Access or Laserfiche Cloud.
Can you export electronic documents in their native format?	Yes	You can export electronic documents in their native format using Laserfiche Export features.
Can you encrypt PDFs before e-mailing?	Yes	Laserfiche supports PDF encryption using its built-in document security features.
Document Management	Meets This Requirement	Comments

Capture	Meets This Requirement	Comments
Is there an intuitive folder view to make organization easy and flexible?	Yes	Yes, Laserfiche offers an intuitive folder view with features like drag-and-drop, flexible naming, and hierarchical organization.
Can you display document names, template fields and other document properties in the folder browser?	Yes	Laserfiche provides the display of document names, template fields, and other properties in the folder browser through its Folder View Configuration feature in Laserfiche Desktop and Laserfiche Web Access.
Can you display a preview pane and display the document, metadata and text without opening the document?	Yes	You can display a preview pane to view the document, metadata, and text without opening the document using Laserfiche Desktop and Laserfiche Web Access.
Can you reindex and reorganize document files?	Yes	You can reindex and reorganize document files using Laserfiche Administration tools and Laserfiche Repository Management features
Can you track document versions?	Yes	A powerful version control system is an integral aspect of the Laserfiche installation. Each version of a document is saved and tracked, viewed or reverted to at any time, by any user with appropriate rights. Additionally, users may (or may be required to) enter comments about any revisions they have made, and our Word integration allows the two versions to be compared side by side, with markups indicating the differences.
Can you compare different versions?	Yes	You can compare different versions of documents using Laserfiche Document Comparison tools.
Can you revert to previous versions?	Yes	Laserfiche's Version History feature allows you to previous versions of documents.
Are there check-in/check-out capabilities?	Yes	Laserfiche offers check-in/check-out capabilities through its Document Management features, allowing users to lock and unlock documents for editing.

Capture	Meets This Requirement	Comments
Is there support for dockable windows, or flexible viewing of images, text, thumbnails and template fields?	Yes	Laserfiche supports dockable windows and flexible viewing of images, text, thumbnails, and template fields through its Laserfiche Desktop and Laserfiche Web Access interfaces.
Can you establish document linking relationships? For example, email attachments are linked to the e-mail.	Yes	You can establish document linking relationships, such as linking email attachments to the email, using Laserfiche's Document Linking feature.
Can public and private folders be set up to allow document sharing, mail folders and ad hoc workflow?	Yes	Yes, public and private folders can be set up to allow document sharing, mail folders, and ad hoc workflow using Laserfiche's Folder Permissions and Workflow features.
Can users place sticky notes on documents with searchable text and hyperlinks?	Yes	Users can place sticky notes on documents with searchable text and hyperlinks using Laserfiche Document Annotation tools.
Can you stamp images with customized or predefined graphics?	Yes	You can stamp images with customized or predefined graphics using Laserfiche Document Imaging tools.
Are annotations image overlays that do not modify the original document?	Yes	Yes, annotations are typically image overlays that don't modify the original document.
Are there informational tags to alert users to special properties?	Yes	Laserfiche provides informational tags to alert users to special properties using Laserfiche Metadata and Document Properties features.
Can you display black and white, color or grayscale images?	Yes	Laserfiche allows you to display black and white, color, or grayscale images using Laserfiche Document Imaging tools.
Can you edit text files created by OCR?	Yes	You can edit text files created by OCR using Laserfiche Document Imaging or Laserfiche OCR tools.
Does the software support full panning, rotation and contrast?	Yes	Laserfiche supports full panning, rotation, and contrast adjustments using its Document Imaging tools.

Capture	Meets This Requirement	Comments
Can you start a business process/workflow from the client?	Yes	You can start a business process or workflow from the client using Laserfiche Workflow and Laserfiche Forms integrated with the client interface.
Can you view the current steps required for a business process?	Yes	You can view the current steps required for a business process using Laserfiche Workflow and Laserfiche Forms with its Workflow Status Dashboard.
Can you preview the document within the folder browser?	Yes	Yes, Laserfiche offers document preview within the folder browser, allowing users to view content without opening the full document. This enhances navigation and quick document assessment.
Can you change the colors on folders?	Yes	You can change the colors on folders using Laserfiche Desktop by customizing folder properties.
Can you export the list contents to run reports with a csv file?	Yes	Laserfiche can export the list contents to run reports with a CSV file using Laserfiche's Export functionality.
Can you rearrange pages in a document or create a new document from a page using drag and drop?	Yes	Laserfiche can rearrange pages in a document or create a new document from a page using drag and drop with Laserfiche Document Imaging tools.
Can you display documents side by side?	Yes	Yes, Laserfiche supports displaying documents side-by-side for comparison and review. This feature enhances productivity and allows users to efficiently analyze and compare information across multiple documents.
Can you customize toolbar icons to launch custom actions?	Yes	Laserfiche can customize toolbar icons to launch custom actions using Laserfiche Desktop with its Toolbar Customization feature.
Does the system support a work queue folder for documents pending approval?	Yes	Laserfiche supports a work queue folder for documents pending approval using Laserfiche Workflow and Laserfiche Forms with its Task Management features.
Records Management	Meets This Requirement	Comments

Capture	Meets This Requirement	Comments
Is the system DoD 5015.2 certified?	Yes	Yes, Laserfiche is DoD 5015.2 certified. This certification validates its compliance with the Department of Defense's standards for records management.
Can you integrate records management, document management and workflow in one environment?	Yes	Laserfiche integrates records management, document management, and workflow into a unified environment through its Laserfiche Records Management, Document Management, and Workflow modules.
Can you create records from documents already under management?	Yes	Laserfiche can create records from documents already under management using Laserfiche Records Management, which allows for the conversion of managed documents into formal records.
Can you manage physical records alongside scanned images and electronic documents?	Yes	Laserfiche allows you to manage physical records alongside scanned images and electronic documents through its Laserfiche Records Management module, which supports integration of both physical and digital records.
Can you manage digital video, audio and other electronic files?	Yes	Laserfiche can manage digital video, audio, and other electronic files through its Document Management capabilities, which support a variety of file formats.
Can you define records series from an intuitive interface?	Yes	You/User can define records series from an intuitive interface using Laserfiche Records Management with its Records Series Configuration tools.
Can you describe locations of transfers for records series?	Yes	You can describe locations of transfers for records series using Laserfiche Records Management with its Records Series and Transfer Tracking features.
Can you track current locations of transferred records?	Yes	Laserfiche can track the current locations of transferred records using Laserfiche Records Management with its Records Tracking and Location Management features.
Can you screen records for eligibility for transfer, accession or destruction?	Yes	Yes, Laserfiche can screen records for eligibility for transfer, accession, or destruction.

Capture	Meets This Requirement	Comments
Can you confirm destruction of eligible records?	Yes	Yes, Laserfiche can confirm destruction of eligible records.
Can you find records according to status or location?	Yes	Yes, Laserfiche can find records by status or location.
Can you specify multiple events that are necessary before records can be cut off?	Yes	Yes, Laserfiche can specify multiple events for records cutoff.
Can you specify trigger events determining which retention schedules apply to records?	Yes	Yes, Laserfiche specifies trigger events for retention schedules.
Can you configure retention schedules so that superseded records are sent into final disposition?	Yes	Yes, Laserfiche can configure retention for superseded records.
Can you auto-classify and auto-file incoming records?	Yes	Yes, Laserfiche offers auto-classification and auto-filing for incoming records.
Can records managers configure the structure of the records environment to suit business unit requirements while preserving original records in the formalized records management environment?	Yes	Yes, records managers can configure the structure.
Does the system provide event based cut-off instructions?	Yes	Yes, Laserfiche provides event-based cut-off instructions.
Does the system provide time based cut-off instructions?	Yes	Yes, Laserfiche provides time-based cut-off instructions.

Capture	Meets This Requirement	Comments
Does the system allow you to specify years and months for the retention period?	Yes	Yes, Laserfiche allows specifying years and months for retention periods.
Does the system support back-file compatibility? Can you change the file date?	Yes	Yes, Laserfiche offers back-file compatibility.
Does the system support a non-recoverable destruction of a record?	Yes	Yes, the Laserfiche system does support the non-recoverable destruction of a record. When a retention schedule has a final disposition of Destruction, the record data can be completely removed from the Laserfiche repository.
Does the system allow you to keep the metadata when a record is destroyed?	Yes	Yes, Laserfiche provides the option for users to keep the metadata, or index values, during the destruction of a record. Alternatively, records can be destroyed along with the metadata.
Does the system allow you to track physical records?	Yes	Laserfiche workflow can be configured to keep track of all physical records in the system.
Can you search for records due for cut-off, destruction and accession in addition to frozen records or records under a legal hold?	Yes	Yes, Laserfiche can search for records due for cut-off, destruction, accession, and those under legal hold or frozen.
Can you place a freeze or hold on a record?	Yes	Yes, Laserfiche allows placing a freeze or hold on a record.
Can you set a review date for vital records?	Yes	Yes, Laserfiche can set review dates for vital records.
Can you change the properties for individual records?	Yes	Yes, you can change properties for individual records.

Capture	Meets This Requirement	Comments
Does the system automatically notify records managers of records approaching their cutoff and/or disposition dates?	Yes	Yes, Laserfiche can automatically notify records managers of approaching cutoff and disposition dates.
Business Process Management	Meets This Requirement	Comments
Are you able to model work processes with an intuitive graphical interface with drag and drop functionality?	Yes	Yes, Laserfiche offers a drag-and-drop workflow design.
Can you automate document movement with rules-based routing?	Yes	Yes, Laserfiche supports automated document movement with rules-based routing.
Does the system include a number of built-in activities to simplify workflow configuration?	Yes	Yes, Laserfiche includes built-in activities for workflow configuration.
Can you maintain productivity with automated e-mail notifications?	Yes	Yes, Laserfiche offers automated email notifications.
Is workflow tracking and escalation available to improve accountability?	Yes	Yes, Laserfiche offers workflow tracking and escalation.
Can you accommodate ad hoc participation in the workflow environment?	Yes	Yes, Laserfiche accommodates ad hoc participation in workflows.
Can you run custom scripts as a step in an automated workflow?	Yes	Yes, Laserfiche supports running custom scripts as a step in an automated workflow.

Capture	Meets This Requirement	Comments
Can you configure security settings on a workflow server to prevent unauthorized changes?	Yes	Yes, Laserfiche allows configuring security settings on a workflow server.
Does the Workflow engine support exception handling?	Yes	Does the Workflow engine support exception handling?
Does the Workflow support a try-catch activity in the case a workflow receives an error?	Yes	Yes, Laserfiche supports try-catch functionality within its workflow engine.
Does the Workflow support and include any web services for integrations?	Yes	Yes, Laserfiche supports web services for integrations.
Does the Workflow include database activities to easily push and pull information from another database without any code?	Yes	Yes, Laserfiche includes database activities for pushing and pulling information without code.
Does the Workflow support inserting data into PDF Forms?	Yes	Yes, Laserfiche supports inserting data into PDF forms.
Can you run a workflow based on an event in the repository or based on a schedule?	Yes	Yes, Laserfiche allows workflows to be triggered by both events in the repository and on a schedule.
Can an administrator terminate a workflow manually?	Yes	Yes, an administrator can manually terminate a workflow.
Can one workflow invoke another workflow?	Yes	Yes, one workflow can invoke another workflow.
Does the Workflow display error or warning messages for each workflow run?	Yes	Yes, Laserfiche displays error and warning messages for each workflow run.

Capture	Meets This Requirement	Comments
Can you graphically see the current step in an active workflow?	Yes	Yes, Laserfiche typically offers a graphical view of active workflows.
Can you assign security on documents and folders dynamically?	Yes	Yes, Laserfiche supports dynamic security assignment.
Can you export/import a workflow?	Yes	Yes, Laserfiche supports workflow export and import.
Can you send email notifications and is the email editor HTML enabled?	Yes	Yes, Laserfiche supports email notifications with HTML editing.
Does the system, either out-of-the-box or through advanced configurations, allow you to add/delete documents from a SharePoint document library?	Yes	Yes, with advanced configurations. Laserfiche can integrate with SharePoint to add and delete documents, but it typically requires custom development or third-party connectors.
Do you offer any calculation activities, such as date or arithmetic?	Yes	Yes, Laserfiche offers calculation activities.
Does the Workflow support regular expressions to retrieve specific values from a string of text?	Yes	Yes, Laserfiche supports regular expressions for extracting specific values from text strings.
Can you start a Workflow from the Workflow designer and track token values?	Yes	Yes, you can start a workflow from the workflow designer and track token values.
Integration	Meets This Requirement	Comments

Capture	Meets This Requirement	Comments
Are out-of-the-box integrations included with the Microsoft Office suite, including Word, Excel, PowerPoint, Excel and Outlook?	Yes	Yes, Laserfiche integrates with Microsoft Office applications using its Laserfiche Office Integration feature, which allows for direct document management and collaboration within Word, Excel, PowerPoint, and Outlook.
Does a version of the system offer an integration with SharePoint?	Yes	Yes, Laserfiche offers integration with SharePoint through its Laserfiche SharePoint Connector, allowing seamless access to Laserfiche's document management features directly within SharePoint environments.
Are built-in activities available to automate the process of retrieving and updating information from third-party databases?	Yes	Yes, Laserfiche provides built-in activities for automating the retrieval and updating of information from third-party databases through its Workflow and Forms features.
To simplify integration, can you access any document stored in the repository with a unique URL or entry ID?	Yes	Laserfiche uses its Document Links feature to provide access to documents in the repository via unique URLs or entry IDs.
Does the company support a marketplace of current integrations or enhancement applications?	Yes	Yes, Laserfiche supports a marketplace of current integrations and enhancement applications through its Laserfiche Marketplace.
Do you offer a REST API and/or an API that supports .NET, C# and Java libraries?	Yes	Laserfiche offers a REST API and supports .NET, C#, and Java libraries through its Laserfiche API and Laserfiche SDK (Software Development Kit)
Is a Code Library available to jump-start custom integrations from working examples with complete code samples?	Yes	Yes, Laserfiche provides a Code Library within its Laserfiche SDK that includes working examples and complete code samples to jump-start custom integrations.
Are there connectors to PaaS platforms that can facilitate a range of integrations?	Yes	Yes, Laserfiche offers connectors to iPaaS (Integration Platform as a Service) platforms,

Capture	Meets This Requirement	Comments
		such as Zapier and MuleSoft, to facilitate a range of integrations.
Can you send requests to external application APIs to facilitate flexible integrations?	Yes	Yes, Laserfiche can send requests to external application APIs through its Laserfiche Workflow and Laserfiche Integration features to facilitate flexible integrations.
Do you support simultaneous co-authoring of Microsoft Office documents?	Yes	Yes, Laserfiche supports simultaneous co-authoring of Microsoft Office documents through its integration with Microsoft Office Online.
Do you integrate with external signature platforms, such as DocuSign?	Yes	Yes, Laserfiche integrates with external signature platforms, including DocuSign, to facilitate electronic signatures and streamline document workflows.
Does the system support REST web services, including a REST API?	Yes	Yes, the system supports REST web services, including a REST API, through its Laserfiche REST API feature for seamless integration and data exchange.
Administration	Meets This Requirement	Comments
Does the licensing model offer volume discounts?	Yes	Laserfiche has tiered discounts.
Are unattended installs supported?	Yes	Details are found in the Laserfiche Administrator's Reference.
Does the system align with accessibility standards, such as Section 508 and WCAG? Are accessibility reports, such as VPATs, available?	Yes	Yes, Laserfiche aligns with Section 508 and WCAG standards and provides VPATs for detailed accessibility compliance.
Is the system administered through a Web-based Administration Console that can be accessed from anywhere?	Yes	Laserfiche provides web-based administration through its Laserfiche Administration Console feature.

Capture	Meets This Requirement	Comments
Is the error and warnings reporting system integrated with the Windows Event Log?	Yes	Laserfiche integrates error and warning reporting with the Windows Event Log using its Laserfiche Event Viewer feature.
Can you integrate with Active Directory or SAML groups, and automatically add users to the system?	Yes	Laserfiche integrates with Active Directory and SAML groups to automatically add users to the system using its Laserfiche Directory Synchronization feature.
Can you create and configure templates/fields with minimal to no technical knowledge?	Yes	Yes, Laserfiche allows the creation and configuration of templates and fields with minimal technical knowledge through its Laserfiche Forms Designer feature.
Can you distribute system options to select users or everyone? For example, saved searches, column profiles, and import options.	Yes	Laserfiche distributes system options such as saved searches and column profiles using its Laserfiche Web Access and Laserfiche Administration Console features.
Can you set a password policy on system users?	Yes	Yes, Laserfiche sets a password policy for system users using its Laserfiche Administration Console feature.
Can you automatically log users off after a period of inactivity?	Yes	Yes, Laserfiche automatically logs users off after a period of inactivity using the session timeout settings in the Laserfiche Administration Console.
How often are updates released?	Yes	Updates for Laserfiche are typically released on a quarterly basis
Does your system support SAML authentication?	Yes	Yes, Laserfiche supports SAML authentication for single sign-on (SSO) integration.
Does your system support SCIM?	Yes	User accounts and licenses are centrally managed through the Laserfiche Directory Server application with advanced user management features including just-in-time licensing and SCIM(System for Cross-domain Identity Management) support.
Can updates and hotfixes be downloaded by the	Yes	Yes, updates and hotfixes can be downloaded by the organization from the Laserfiche Support Site.

Capture	Meets This Requirement	Comments
organization from the support site?		
Security	Meets This Requirement	Comments
Are there storage and security measures supporting regulatory compliance?	Yes	Laserfiche supports regulatory compliance with storage and security measures through features such as Laserfiche Compliance Suite and Laserfiche Security Controls.
Are there privilege rights controlling administrative functions?	Yes	Laserfiche controls administrative functions through Laserfiche Role-Based Access Control (RBAC).
Are there feature rights controlling functions like scanning, printing, searching and importing?	Yes	Laserfiche controls functions like scanning, printing, searching, and importing through Laserfiche Document and Folder Permissions.
Are there access rights determining the level of access to documents and folders for users or groups?	Yes	Laserfiche determines access to documents and folders through Laserfiche Folder and Document Permissions.
Are there field access controls limiting users' ability to see and edit fields?	Yes	Laserfiche enforces field access controls through Laserfiche Field-Level Security settings.
Can you determine effective rights for any user?	Yes	Yes, Laserfiche determines effective rights for any user using the Laserfiche Security Matrix feature.
Are rights enforceable for both users and groups?	Yes	Laserfiche enforces rights for both users and groups through its Role-Based Access Control (RBAC) system.
Can you enforce password policies, including length, complexity and duration of passwords?	Yes	Laserfiche enforces password policies, including length, complexity, and duration, through the Laserfiche Administration Console.

Capture	Meets This Requirement	Comments
Does the system support multifactor authentication (MFA)?	Yes	Laserfiche supports multifactor authentication (MFA) for enhanced security.
Can you allow or deny security rights explicitly through inheritance?	Yes	Laserfiche allows or denies security rights explicitly through inheritance using Laserfiche Folder and Document Permissions.
Is inheritance controlled through flexible scoping options?	Yes	Yes, inheritance is controlled through flexible scoping options using Laserfiche Security Inheritance Settings.
Do security tags place special restrictions on documents and folders?	Yes	Security tags place special restrictions on documents and folders using Laserfiche Security Tags.
Are you able to securely redact sensitive portions of documents?	Yes	Laserfiche securely redacts sensitive portions of documents using the Laserfiche Redaction Tool.
Are there various levels of audit tracking for compliance and accountability?	Yes	Laserfiche provides various levels of audit tracking for compliance and accountability through its Laserfiche Audit Trail feature.
Can you control security permissions centrally or delegate to department heads?	Yes	Laserfiche allows you to control security permissions centrally or delegate management to department heads using Laserfiche Role-Based Access Control (RBAC) and delegated administration features.
Are digital signatures available?	Yes	Yes, Laserfiche supports digital signatures through its Laserfiche Electronic Signatures feature.
Is there native support for single sign on?	Yes	Laserfiche offers native support for single sign-on (SSO) through its integration with SAML and OAuth protocols.
Does the system support SSL for secure communication?	Yes	Yes, Laserfiche system supports SSL (Secure Sockets Layer) for secure communication.
Is there a secure recycle bin with administrative control?	Yes	Laserfiche provides a secure recycle bin with administrative control using the Laserfiche Recycle Bin feature.
Can you force printouts to include security	Yes	Laserfiche provides security watermarks for

Capture	Meets This Requirement	Comments
watermarks for tracking origins?		tracking origins through its Document Security feature.
Can you require users to indicate the reason for document export?	Yes	Laserfiche provides this capability through its Export Audit Trail feature, which can be configured to require reasons for document export.
Can you track all successful and unsuccessful activity in the system and write it on a log file? For example, sign on, opened document, changed metadata, deleted and modified system configurations.	Yes	Laserfiche tracks all system activities through its Audit Trail feature, which logs both successful and unsuccessful actions.
Can you generate web-based audit reports, available as tables or charts?	Yes	Laserfiche provides Audit Trail Reports that can be generated as web-based tables or charts.
Can audit reports be filtered based on event type, date range, user, and other criteria?	Yes	Laserfiche uses the Audit Trail feature to filter audit reports based on event type, date range, user, and other criteria.
Does the system support encryption of data at rest?	Yes	Laserfiche supports encryption of data at rest through its Data Encryption feature.
Does the system allow you to set security so users can only access the information through the ECM client?	Yes	Laserfiche allows you to set security so users can only access information through the Laserfiche client.
Forms	Meets This Requirement	Comments
Does the system provide an intuitive electronic Forms module?	Yes	Laserfiche provides an intuitive electronic Forms module through its Laserfiche Forms feature.

Capture	Meets This Requirement	Comments
Are the process and e-forms designers WYSIWYG?	Yes	Laserfiche provides WYSIWYG process and e-forms design through its Laserfiche Forms Designer and Laserfiche Workflow Designer features.
Can you create forms by dragging and dropping preconfigured fields?	Yes	Laserfiche allows you to create forms by dragging and dropping preconfigured fields using its Laserfiche Forms Designer.
List the types of preconfigured fields available	Yes	Laserfiche Forms Designer offers preconfigured fields such as Text, Date, Number, Dropdown List, Radio Buttons, Checkboxes, File Upload, Email, Phone, Currency, and Hyperlink fields, enabling a range of data entry options.
Can you upload documents or e-forms and import them into the repository?	Yes	Users can upload documents or e-forms and import them into the repository using Laserfiche's Import Agent and Laserfiche Forms features.
Can you easily create dynamic field rules? For example, selecting YES will display an "Explain" field.	Yes	You/Users can easily create dynamic field rules in Laserfiche Forms Designer, such as displaying an "Explain" field when "YES" is selected.
Does Forms support querying a table based on a field value to auto populate fields with existing information?	Yes	Laserfiche Forms supports querying a table based on a field value to auto-populate fields with existing information using its Dynamic Field Rules and Form Data Integration features.
Can you secure e-forms to prevent unauthorized access?	Yes	You/Users can secure e-forms in Laserfiche to prevent unauthorized access by using its Form Security settings and Access Control Lists (ACLs).
Does your e-forms product support variables to share information from one form to another?	Yes	Laserfiche Forms supports variables to share information between forms through its Form Variables and Data Integration features.
Does your e-forms product include a process modeler based on BPMN?	Yes	Laserfiche provides a BPMN-based process modeler through its Laserfiche Workflow Designer feature.

Capture	Meets This Requirement	Comments
Can you easily create a workflow from Forms to route it from one user to another?	Yes	Laserfiche Workflow allows easily create a workflow to route forms from one user to another.
Do business process management features within your e-forms product support exception handling?	Yes	Laserfiche Forms supports exception handling through its Laserfiche Workflow feature.
Can users insert comments when approving a form?	Yes	Users can insert comments when approving a form using Laserfiche Forms.
Can you secure forms with authentication and allow certain users/groups access to the form?	Yes	Users can secure forms with authentication and control access by user or group using Laserfiche Forms access control settings.
Can you make forms publicly available?	Yes	Users can make forms publicly available by configuring Laserfiche Forms to allow public access through a web link or embedded on a website.
Can you fill out a PDF form based on the form submission?	Yes	Users can fill out a PDF form based on form submission using Laserfiche Forms with its PDF integration features.
Can you insert text above or below the field without coding?	Yes	Users can insert text above or below fields in Laserfiche Forms using the Form Designer's drag-and-drop interface without coding.
Can you use CSS and JavaScript to extend the functionality of your e-forms product?	Yes	You/Users can use CSS and JavaScript to extend the functionality of Laserfiche Forms through its Custom Scripts and Custom Styling options.
Can you use HTML code on your form fields?	Yes	You/Users can use HTML code in your form fields with Laserfiche Forms by leveraging the Custom HTML feature.
Can you embed iframes into e-forms, to display external webpages in the interface?	Yes	You/Users can embed iframes into e-forms using Laserfiche Forms by adding an HTML Field and including the iframe code.

Capture	Meets This Requirement	Comments
Does you provide a “tasks” page with a list of forms that require your attention?	Yes	Yes, Laserfiche provides a “Tasks” page with a list of forms requiring attention through its Laserfiche Forms Task Dashboard feature.
Does you provide a “start” page with a list of forms you can initiate?	Yes	Laserfiche provides a “Start” page with a list of forms you can initiate through its Laserfiche Forms Form Launcher feature.
Does you provide a “submissions” page with a list of forms recently submitted by the user?	Yes	Laserfiche provides a “Submissions” page with a list of recently submitted forms through the Laserfiche Forms My Submissions feature.
Does you provide an intuitive tool to configure the colors, fonts and pictures on the form?	Yes	Laserfiche provides an intuitive tool to configure colors, fonts, and pictures on the form through its Form Designer feature.
Cloud	Meets This Requirement	Comments
Is a cloud or Software as a Service (SaaS) version of the system available?	Yes	Laserfiche Cloud is a Software as a Service (SaaS) solution offered by Laserfiche which enables a fully featured installation of Laserfiche hosted in the AWS cloud
Is the licensing model competitive with on-premises offerings?	Yes	Considering that City will not have to manage their own environment on-premise, the Cloud SaaS Solution offered by Laserfiche is very competitive.
Does the cloud licensing model offer discounts that scale with the number of users licensed for the system?	Yes	Laserfiche offers tiered based pricing discount for both Full Names User Licenses and Read-Only User Licenses.
Is there a Full User licensing option that allows a user to add content to the system, retrieve content and participate in forms and workflow processes?	Yes	Laserfiche offers Full Named User License which allows users to add new content to the system, retrieve the existing documents from the system and participate in forms and workflow processes.

Capture	Meets This Requirement	Comments
Is there a Participant User licensing option that allows a user to retrieve content from the system and participate in forms and workflow processes?	Yes	Laserfiche offers Participant (Read-Only) Named User License which allows users to retrieve the existing documents from the system and participate in forms and workflow processes.
Does your cloud offering offer feature parity with your on-premises offering?	Yes	Laserfiche offers feature parity between Cloud model and On-Premise model. For On-Premise model, Laserfiche offers hybrid features that are hosted on Cloud system. So, users can leverage feature parity between both models.
Is your cloud offering supported by multiple availability zones?	Yes	Laserfiche Cloud SaaS services are hosted in multiple regions, consisting of multiple availability zones with multiple data centers.
Do you have a SOC 2 Type 2 report for your cloud offering?	Yes	Laserfiche maintains a SOC 2 Type 2 Plus attestation and utilizes industry best practices in implementing applicable data privacy regulatory controls. Upon request Laserfiche can directly provide.
What regions will data be used for hosting data?	Yes	Laserfiche Cloud uses the US West (Oregon) Region to host the data.
Are your data and privacy policies aligned with regulations such as GDPR, CCPA, and PIPEDA?	Yes	Laserfiche Cloud platform addresses data privacy regulations including GDPR, CCPA and PIPEDA
Does your cloud offering provide out-of-the-box integrations with CRM systems such as Salesforce or Dynamics 365?	Yes	Laserfiche comes equipped with an array of high level integrations that can be customizable and configurable based on the business oriented requirements. Such integrations include but is not limited to categories such as administrative Tools, Capitol Program Management, Cloud, CRM Integrations, Digital and Electronic Signatures, Document Capture and Distribution, Electronic Forms, Email Archiving, Geographic Information Systems, Handwriting Recognition and Data Extraction, Image Enhancement, Meeting Management, Open Records Request

Capture	Meets This Requirement	Comments
		Management, Physical Records Management, Reporting/Analytics.
Does your cloud offering provides automatic transcription of video or audio files for searchability?	Yes	When an audio or video file is imported into Laserfiche, it will be automatically transcribed for searching.
Does your cloud offering provide machine learning-based capture tools to read data from unstructured documents, such as invoices?	Yes	Laserfiche Cloud does offer machine learning-based capture tools that can read data from unstructured documents like invoices. Their Intelligent Data Capture feature utilizes AI, machine learning, and OCR to extract information from documents
Does your cloud offering provide a secure way to work with resources outside of the SaaS environment or behind a firewall, such as external databases or scripts?	Yes	Laserfiche Cloud offers a secure way to work with resources outside of its SaaS environment, including external databases or scripts. It allows for the use of remote agents to query external data sources and transmit the results to Laserfiche Cloud.
Does your cloud offering provide basic RPA functionality to facilitate automation or integrations?	Yes	Laserfiche Cloud — including direct and custom integrations as well as last-mile integration tools powered by RPA technology.

F. Appendix

F.1. Laserfiche Product Suite

Laserfiche Product Suite

The Laserfiche enterprise content management system is designed to be straightforward to purchase, deploy, extend, administer and support. Our solutions give IT managers central control over their information infrastructure, including standards, security and auditing, while still offering business units the flexibility to react quickly to changing conditions. To simplify system administration, the Laserfiche product suite is built on top of Microsoft technologies, deploys quickly and easily scales to accommodate both an increasing number of users and high-volume repository growth.

Laserfiche Product Feature Matrix

- Content Management Features
- Document Imaging Features
- Records Management Features
- Administration and Configuration Features

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Content Management Features		Laserfiche Avanter	Laserfiche Rio
Search and Retrieval		Standard	Enterprise
Full-Text Search: Search the contents of the entire repository (imaged and electronic documents) for a specific word or phrase. Find what you need despite alternate spellings or typos using fuzzy search and search stemming, and use Boolean searches to narrow your focus.		✓	✓
Text Generation: Make image files full-text searchable through OCR, and use image enhancements to improve your OCR results. Generate text from electronic documents to make them searchable as well.		✓	✓
Property/Metadata Search: Search on a single property or a combination, including location, file type, creation date or user-defined metadata such as field values, tags, document relationships and version information.		✓	✓
Search Toolbar: Automatically perform the most commonly used searches (text, field, annotation and name), as well as custom searches.		✓	✓
Search Options: Perform basic and advanced searches through simple user interfaces or with user-provided syntax.		✓	✓
Windows/Office/SharePoint Interoperability		Standard	Enterprise
Ease-of-Use: Based on Windows navigation standards for a familiar look and feel in the user interface. Administrators can customize repository views to suit needs of information workers, and users can customize the interface to suit their preferences and job functions.		✓	✓
Microsoft Office: Send documents directly to Laserfiche from Office applications. Open Office documents in Laserfiche directly in their native applications, and add or change Laserfiche metadata without leaving that program.		✓	✓
Microsoft Outlook E-mail: From Laserfiche, archive e-mail and automatically extract message properties as metadata, as well as e-mail documents directly from the repository. From an Outlook e-mail message, browse the Laserfiche repository to attach documents.		✓	✓
Web Folders/WebDAV: Expose the Laserfiche folder structure through Windows Explorer for simple drag and drop and browsing.		✓	✓
Microsoft SharePoint: Add document imaging and records management to SharePoint out of the box with Web Parts, a Records Center integration and a search integration. Use Laserfiche Workflow to automatically create tasks for users within SharePoint.		Optional	✓
Workflow		Standard	Enterprise
Workflow Designer: Create workflows with an intuitive, graphical design tool that provides a top-down process map and wizard-driven configuration.		✓	✓
Built-In Activities: Create workflows quickly from a toolbox of built-in activities that includes routing choices, Laserfiche actions, enterprise integration, PDF from processing and digital signature options.		✓	✓
Customized Routing: Route documents based on conditions you define or specify different actions to be taken after a deadline, or after a specified event occurs.		✓	✓
PDF Forms: Read information from PDF forms to expedite business processes, automatically file information or assign metadata. Also fill out a PDF form with data from a Laserfiche entry or a third-party database accessible by Laserfiche.		✓	✓
Extensible Functionality: Create custom VB.NET and C# scripts using a built-in editor or design your own activities.		✓	✓

Content Management Features (Continued)	Laserfiche Avante	Laserfiche Rio
Workflow	Standard	Enterprise
Workflow Operations: Administer workflows across your organization, with import/export capabilities, workflow instance reporting, manual termination functionality and user roles and security options.	✓	✓
Windows Workflow Foundation (WF): Use activities written for Windows Workflow Foundation to extend Workflow functionality to all line-of-business applications.	✓	✓
Security	Standard	Enterprise
Active Directory Integration: Allow employees to use single sign-on authentication with a Windows domain account, and simplify your administration by taking advantage of existing domain and directory groups.	✓	✓
Permission Inheritance: Configure access through group membership, and allow users to inherit security settings from the groups they belong to.	✓	✓
Access Control Lists: Secure documents through access control lists, security tags and secure documents.	✓	✓
Role-Based Authorization: Use granular permissions to grant access based on a user's role.	✓	✓
Privilege Delegation: Delegate administrative roles to more than one user with individual permissions.	✓	✓
Secure Deletions: Secure deletions with DoD 5022.22 M-compatible deletion protocols.	✓	✓
Secure Recycle Bin: Documents in the recycle bin have original security fully intact. Administrators can control which users are allowed to permanently purge items from the recycle bin.	✓	✓
Volume Checksums: Verify that the contents of your volume have not been altered outside of Laserfiche.	✓	✓
Secure Communication: Support for SSL for secure communication.	✓	✓
Digital Signatures: Sign and validate document contents directly within your repository using digital signatures.	Optional	✓
Security Watermarks: Create mandatory watermarks for printed, exported or viewed documents.	✓	✓
Extensibility/Integration	Standard	Enterprise
Uniquely Addressable Documents: Access any Laserfiche document with a unique URL or entry ID.	✓	✓
Workflow SDK: Work with the Laserfiche Workflow engine by integrating enterprise applications or creating custom business process steps.	✓	✓
Solutions and Integrations: Jump-start your Laserfiche implementation with expert advice, from tips and tricks to custom integrations. The Laserfiche Solution Exchange and the Support Site's Code Library offer working examples, often with complete code samples, which can be used out of the box or extended.	✓	✓
Extensible Web Interfaces: Customize Web interfaces built on ASP.NET.	Optional	✓
Laserfiche SDK: Integrate Laserfiche with third-party systems, such as Websites, scripts and Windows applications.	Optional	Optional

Content Management Features (Continued)	Laserfiche Avante	Laserfiche Rio
Extensibility/Integration	Standard	Enterprise
.NET SDK: Create custom Laserfiche integrations with .NET.	Optional	Optional
Quick Fields Script Editor: Create C# or VB.NET scripts and assign them to a Quick Fields 8.3 event, such as Document Created, Document Unidentified and Document Stored. When the event takes place, scripts tied to the event are executed.	Optional	Optional
Library Services	Standard	Enterprise
Document Metadata: Add user-defined metadata to documents, such as tags, document relationships and customized field and template information.	✓	✓
Versions and Check-In/Out: Keep track of changes to documents and aid collaboration with automated version control and check-in/check-out. Document versions allow users to modify documents while maintaining the document's history. In addition, when a document is checked out, users can make changes to the document without worrying about edit conflicts—and other users can still view read-only versions of that document.	✓	✓
Auditing: Track changes to all system events with a built-in auditing solution for security and compliance. Create and view reports as tables or charts through the Audit Trail Web Reporter portal, or further customize them using a .NET library or Microsoft SQL Reporting Services.	Optional	✓

Document Imaging Features	Laserfiche Avante	Laserfiche Rio
Capture	Standard	Enterprise
Scanning: Scan from Windows and Web. Supports TWAIN, ISIS, Kofax and WIA.	✓	✓
PhotoDocs: Import photos from digital or mobile phone cameras into Laserfiche, and straighten warped or curved images to generate clean, usable OCR text.	✓	✓
Universal Capture: Capture images already stored on your computer or network, and process them as you would scanned images—including basic image enhancement, OCR and metadata.	✓	✓
Mobile Capture: Use the Laserfiche Mobile app for iPhone or iPad to remotely capture documents using the device camera and automatically clean up images with PhotoDocs technology.	Optional	✓
Automated Import: Monitor UNC addressable locations and import files based on business rules (Import Agent).	Optional	Optional
Conversion	Standard	Enterprise
Image Conversion: Convert imported images to single-page TIFF files for long-term archival purposes.	✓	✓
Snapshot Printer: Convert and store electronic documents as archival images.	✓	✓
Native PDF Conversion: Automatically create TIFF images from PDF documents.	✓	✓

Document Imaging Features (Continued)	Laserfiche Avante	Laserfiche Rio
Image Annotation	Standard	Enterprise
Sticky Notes: Add searchable notes, which are securable as private or protected and allow you to view saved note history.	✓	✓
Redaction: Redact image and associated text to completely withhold sensitive information.	✓	✓
Drawing Tools: Highlight, strikethrough, underline, text annotations, shapes and freehand markup tools facilitate collaboration.	✓	✓
Attachment: Create compound documents by attaching files to imaged documents.	✓	✓
Processing	Standard	Enterprise
PDF Forms: Read information from PDF forms to expedite business processes, automatically file information or assign metadata.	Optional	Optional
Forms Processing: Identify and separate standardized forms, and extract information from them for use in organization and retrieval.	Optional	Optional
Data Extraction: Extract data by "reading" a portion of an image, reading a barcode, determining whether an area is marked or matching text to patterns.	Optional	Optional
Data Validation: Check your data with regular expressions. Retrieve supplemental metadata or perform validation from external data sources.	Optional	Optional
Extract, Transform, Load (ETL): Extract documents and metadata from one system, translate the data for the schema of another system and load the documents and data based on business rules (Laserfiche Capture Engine).	Optional	Optional
Bates Numbering: Electronically imprint documents with sequential alphanumeric numbers.	Optional	Optional
PDF-TIFF Conversion: Automate conversion of PDF files to TIFF images for archival storage.	Optional	Optional

Records Management Features	Laserfiche Avante	Laserfiche Rio
Records Classification	Standard	Enterprise
Autofiling: System can automatically file records in the proper records series, create records folders and set the filing date.	✓	✓
E-mail: Easily archive e-mail records through a drag-and-drop interface. Automatically extract metadata from Outlook.	✓	✓
Hierarchical File Plans: Classify and store documents according to your existing structure and access control lists.	Optional	Optional
Batch Record Processing: Organize related records and perform records management actions on all of them at once.	Optional	Optional
DoD 5015.2 Version 3 Certification: Comply with DoD records management standards.	Optional	Optional
Import File Plans: System can create a complete file plan by reading a schedule from Excel.	Optional	Optional

Records Management Features (Continued)	Laserfiche Avante	Laserfiche Rio
Records Tracking	Standard	Enterprise
Track Electronic and Non-Electronic Records: Support records management for electronic and non-electronic records.	Optional	Optional
Lifecycle Management: Define cutoff criteria, retention, transfers and disposition of documents. Search for records and perform records management activities.	Optional	Optional
Legal Holds: Freeze records disposition when legal holds are placed.	Optional	Optional
E-mail Reports: Combine records management reporting with content, location and user-specific search criteria and e-mail to records managers.	Optional	Optional
Alternative Views: Customize views independent of records series to provide an intuitive look and feel for each department.	Optional	Optional

Administration and Configuration Features	Laserfiche Avante	Laserfiche Rio
System Administration	Standard	Enterprise
Unattended Installs: Support for unattended installs.	✓	✓
Flexible Administration: Perform administrative tasks, such as creating user accounts and setting security, with the desktop Administration Console or from any browser with the Laserfiche Web Administration Console.	✓	✓
MMC: Manage your Laserfiche repositories through a Laserfiche Administration Console snap-in for Microsoft Management Console (MMC).	✓	✓
Event Tracing: Troubleshoot with Event Tracing for Windows (ETW), supplemented by HTTP logging and real-time "console mode."	✓	✓
Windows Event Log: Monitor health of the system with a Laserfiche errors and warnings reporting system integrated with the Windows Event Log, viewable on the Server computer from anywhere using the Web Administration Console.	✓	✓
License Manager: Manage licenses for your Laserfiche software. Allocate licensed products, features and users as appropriate for your site.	n/a	✓
Active Directory Synchronization: With the Laserfiche Rio License Manager, automatically grant or deny licenses to Windows users based on their group membership.	n/a	✓
Web Portal: Web-based portal for anonymous/public or secure access. Laserfiche Avante: portals with 10, 25 or 50 licenses available. Laserfiche Rio: unlimited per-processor licensing.	Optional	Optional
Archiving and Export: Store documents and metadata on removable media with an embedded viewer.	Optional	Optional

Administration and Configuration Features (Continued)		Laserfiche Ayante	Laserfiche Pro
Supported Configuration		Standard	Enterprise
Authentication: Active Directory, LDAP, Kerberos, SSL, Laserfiche Security.		✓	✓
Server Operating System: Windows Server 2003, Windows Server 2008, Windows Server 2008R2.		✓	✓
Client OS: Windows XP, Windows Vista, Windows 7, Mac (Web Access only).		✓	✓
Databases: MS SQL Server 2000, MS SQL Server 2005, MS SQL Server 2008, MS SQL Server 2012, Oracle 10g, Oracle 11g.		✓	✓
Web Server: IIS.		✓	✓
Technologies: HTTP/WebDAV, .NET.		✓	✓
Virtualization: VMware Infrastructure, VMware vSphere, VMware Workstation, VMware Server.		✓	✓
Mobile Access: Secure, anywhere access through the Laserfiche Mobile app for iPhone and iPad or via a Web browser with Web Access Light.		Optional	✓
Web Browsers: Internet Explorer 6*, Mozilla Firefox 2*, Safari 4*, Chrome 6*.		Optional	✓
Clustering: Support for Active/Passive Failover.		Optional	✓
Support for Multiple Systems/Servers: Development systems, test systems, training systems, backup systems, multiple servers for remote offices or secure data.		Optional	✓
Certificates and Compliance		Standard	Enterprise
Section 508: Compliant with Section 508 standards, providing for equal access to electronic data in Laserfiche to people with disabilities.		✓	✓
DoD-Certified Records Management: Certified in the Department of Defense 5015.2 version 3 design criteria standard for electronic records management, the accepted standard for many state, county and local governments.		✓	✓
VERS: Certified with the Victorian Electronic Record Strategy (VERS) requirements, a world-recognized standard for reliably and authentically preserving electronic records over long periods of time.		Optional	✓
Digital Signatures: Integrated solution that complies with FISMA, CFR Part 11 FDA, FIPS, VERS and Clinton E-Signatures Act standards.		Optional	✓
Laserfiche 3545 Long Beach Blvd. Long Beach, CA 90807 Web: www.laserfiche.com Phone: (800) 985-8533 E-mail: info@laserfiche.com		© 2012 Laserfiche. Laserfiche is a division of Compulink Management Center, Inc. Laserfiche®, Run Smarter® and Compulink® are registered trademarks of Compulink Management Center, Inc. All other trademarks are properties of their respective companies. Due to continuing product development, product specifications and capabilities are subject to change without notice. Printed in the USA. Item No.	

F.2.Laserfiche Cloud Brochures



Laserfiche Cloud

Laserfiche Cloud is a Software as a Service (SaaS) solution that provides a central digital repository accessible from anywhere.

Laserfiche Cloud at a Glance

- Upload, view and modify content in a streamlined fully responsive web interface
- Create new documents and digitize existing archives
- Work with documents in a secure, digital document repository
- Facilitate compliance and reduce risk management with built-in-audit reports
- Manage, create and set up security rights from one administrative login
- Connect your repository to productivity applications with built-in Microsoft Office® integration
- Schedule bulk import and archival of paper and electronic documents
- Automatically share, process and update forms and customer data with the included Laserfiche Integration with Laser App®
- Integrate other third-party applications—including most CRM systems—with one click using Laserfiche Connector, a code-free integration tool

Capture Documents From Any Device

Laserfiche Cloud makes it easy to centralize paper and electronic files from multiple devices.

- **Scanning:** Convert paper records to imaged files on demand by connecting your scanner to Laserfiche Cloud with the Laserfiche Scanning tool
- **Digital Capture:** Reduce back-office work by saving to default folders with one click, auto-importing documents and automatically populating metadata
- **Mobile Capture:** Turn photos taken on phones and tablets into searchable, secure documents

Simplify Process Management

Save hours of staff time with built-in business process management tools that boost staff productivity and simplify task management for resource-intensive, multi-department processes including invoice processing, travel and expense management and contract management.

- **Electronic Forms:** Create and publish customized e-forms that require no coding or scripting
- **Work Automation:** Kick off routing and approval workflows when e-forms are submitted
- **Process Management:** View dashboards and reports of all submitted forms, pending and complete tasks and approval histories
- **Mobile Integration:** Review and approve submitted forms from any mobile device to keep business processes moving forward no matter where you are

Intuitive folder structures and a responsive user interface enable secure document access on any device.

Enable Rapid Adoption With User-Friendly Features

Get employees, customers, contractors and third parties using digital documents quickly with repositories that provide filtered, personalized views of files and options.

- **Custom User Views:** Filter by recently opened, frequently used and active documents
- **Rich Search:** Instantly retrieve documents with quick and advanced search options tailored to individual users' security rights
- **Robust Metadata:** View and modify all document metadata, annotations, fields and other modifications in a single user-friendly pane

Update documents, redact confidential information and change document metadata from one place.

Protect Documents With Robust Auditing And Security

Bring control and transparency to your operations with built-in tools that manage the use of information assets stored throughout your Laserfiche Cloud system.

- **Automatic Auditing:** Automatically generate reports of user actions, document access and modifications
- **Built-In Disaster Recovery:** Perform system backups automatically without user intervention
- **Granular System Security:** Control user actions and document access down to the metadata level from a streamlined administration account
- **Digital Signatures:** Post signing requests to DocuSign® to sign documents directly from Laserfiche Cloud

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About Laserfiche

Laserfiche Enterprise Content Management transforms how organizations manage information, automate document-driven business processes and make timely, informed decisions. Using Laserfiche, organizations can innovate how documents and unstructured information are processed and analyzed to achieve business results. Laserfiche provides intuitive solutions for capture, electronic forms, workflow, case management, cloud, mobile and government-certified records management. Since 1987, Laserfiche has been the trusted choice of more than 36,000 organizations worldwide.

Your Next Step

Read White Papers and Case Studies
laserfiche.com/cloud

Get a Demo
(800) 985-8533

Contact Us
cloudinfo@laserfiche.com

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