

RFP 2024-4-CC
DOCUMENT MANAGEMENT SYSTEM

THIS IS AN AGREEMENT, dated the _____ day of _____, 20____, by and between:

THE CITY OF COOPER CITY, a municipal corporation of the State of Florida with a business address of **9090 SW 50th Place, Cooper City, Florida 33328** (hereinafter referred to as the "CITY")

and

Global Solutions Group, Inc., a Foreign Profit Corporation, authorized to do business in the State of Florida, with a business address of 25900 Greenfield Rd., STE #220, Oak Park, MI (hereinafter referred to as the "CONTRACTOR"). CITY and CONTRACTOR may hereinafter be referred to collectively as the "Parties."

WITNESSETH:

WHEREAS, the Contractor has offered to provide Document Management System services, on a non-exclusive basis, that shall conform to the Scope of Services (see Appendix A), Request for Proposals ("RFP") No. 2024-4-CC and all associated addenda and attachments incorporated herein by reference and the requirements of this Agreement; and

WHEREAS, the Contractor has submitted a written proposal dated August 8, 2024 which is incorporated herein by reference; and

WHEREAS, the City desires to procure from the Contractor, Document Management System for the City, in accordance with the terms and conditions of this Agreement,

NOW, THEREFORE, in consideration of the mutual terms and conditions, promises, covenants and payments hereinafter set forth, City and Contractor agree as follows:

ARTICLE 1
PREMABLE

In order to establish the background, context and form of reference for this Agreement and to generally express the objectives, and intentions of the respective parties herein, the following statements, representations and explanations shall be accepted as predicates for the undertakings and commitments included within the provisions which follow and may be relied upon by the parties as essential elements of the mutual considerations upon which this Agreement is based.

1.1 On Friday, July 5, 2024, the CITY advertised its notice to bidders of the CITY's desire to hire a firm to provide a document management system as more particularly described in **Appendix "A"** attached hereto and by this reference made a part hereof, for the said bid entitled:

RFP 2024-4-CC
DOCUMENT MANAGEMENT SYSTEM

1.2 On Thursday, August 8, 2024, the bids were opened publically.

1.3 On _____ day of _____, 20____, the CITY awarded the bid to CONTRACTOR and approved an agreement with CONTRACTOR consistent with the terms and conditions set forth herein.

ARTICLE 2

SERVICES AND RESPONSIBILITIES

2.1 CONTRACTOR hereby agrees to perform the services for a **Error! Reference source not found.**, as more particularly described in **Appendix "A"** attached hereto and by this reference made a part hereof, in accordance with the Scope of Services outlined in the specifications, "Error! Reference source not found.", **ERROR! REFERENCE SOURCE NOT FOUND.** and CONTRACTOR's response thereto. CONTRACTOR agrees to do everything required by this Agreement, the Sealed Bid Package, Addenda to this Agreement, and Commission award complete with proposal form.

2.2 If there is a conflict between or among the provisions of this Agreement, the order of precedence is as follows: 1) Agreement; 2) Appendix A – Scope of Services (including any Attachments thereto); 3) Appendix B – Pricing Proposal (including any Attachments thereto); 4) City of Cooper City RFP2025-2 and any associated addenda any other exhibits and attachments 5) the CONTRACTOR's Proposal. This Agreement shall supersede any "click-through" terms and conditions that may be imbedded in any license software or service agreement(s).

2.3 CONTRACTOR shall furnish all services, labor, equipment, and materials necessary and as may be required in the performance of this Agreement, except as otherwise specifically provided for herein, and all work performed under this Agreement shall be done in a professional manner.

2.4 CONTRACTOR hereby represents to CITY, with full knowledge that CITY is relying upon these representations when entering into this Agreement with CONTRACTOR, that CONTRACTOR has the professional expertise, experience and manpower to perform the services to be provided by CONTRACTOR pursuant to the terms of this Agreement.

2.5 CONTRACTOR shall not utilize the services of any sub-Contractor without the prior written approval of CITY.

ARTICLE 3

TERM AND TERMINATION

3.1 The Contract shall become effective on the date identified on the first page of the Agreement and shall continue through the last day of the thirty-sixth (36) month or _____. This Agreement may be renewed for up to one (1) additional two (2) year term, subject to the written consent and agreement by both parties.

3.2 The City reserves the right to exercise its option to extend this Contract for up to one hundred eighty (180) calendar days beyond the current Contract period. If exercised, the City will notify the Contractor of the extension in writing. This Contract may be extended beyond the initial one hundred eighty (180) calendar day extension period by mutual agreement between the City and the Contractor, upon approval by the City Commission.

3.3 This Agreement may be terminated by either party for cause, or by the CITY for convenience, upon thirty (30) days written notice by the CITY to CONTRACTOR in which event the CONTRACTOR shall be paid its compensation for services performed to termination date. In the event that the CONTRACTOR abandons this Agreement or causes it to be terminated, CONTRACTOR shall indemnify the CITY against any loss pertaining to this termination up to a maximum of the full contracted fee amount. All finished or unfinished documents, data, studies, plans, surveys, and reports prepared by CONTRACTOR shall become the property of CITY and shall be delivered by CONTRACTOR to CITY immediately.

ARTICLE 4

COMPENSATION AND METHOD OF PAYMENT

4.1 CONTRACTOR shall be entitled to invoice CITY on a monthly basis for services performed. The invoice shall include, but not be limited to, date of service, the amount of time spent, a description of the service, and any other information reasonably required by CITY. The compensation shall not exceed the unit prices stated in **Exhibit "B"**.

4.2 CITY will make its best efforts to pay CONTRACTOR within thirty (30) days of receipt of proper invoice the total shown to be due on such invoice.

4.3 All payments shall be governed by the Florida Prompt Payment Act, as set forth in Part VII, Chapter 218, Florida Statutes.

4.4 Payment will be made to CONTRACTOR at:

GLOBAL SOLUTIONS GROUP, INC.
Attn: Lisa Salvador
25900 Greenfield Road, Suite 220
Oak Park, MI 48237

ARTICLE 5

CHANGES TO SCOPE OF WORK AND ADDITIONAL WORK

5.1 CITY or CONTRACTOR may request changes that would increase, decrease, or otherwise modify the Scope of Services, as described in **Appendix "A,"** to be provided under this Agreement as described in Article 2 of this Agreement. These changes will affect the monthly compensation accordingly. Such changes or additional services must be in accordance with the provisions of the Code of Ordinances of the CITY, and must be contained in a written amendment, executed by the parties hereto, with the same formality, equality and dignity herewith prior to any deviation from the terms of this Agreement, including the initiation of any additional or extra work.

5.2 In no event will the CONTRACTOR be compensated for any work which has not been described in a separate written agreement executed by the parties hereto.

ARTICLE 6

INDEMNIFICATION

6.1 CONTRACTOR shall indemnify and save harmless and defend the CITY, its trustees, elected and appointed officials, agents, servants and employees from and against any and all claims, demands, or causes of action of whatsoever kind or nature sustained by the CITY or any third party arising out of, or by reason of, or resulting from acts, error, omission, or negligent act of CONTRACTOR, its agents, servants or employees in the performance under this Agreement, for all costs, losses and expenses, including but not limited to, damages to persons or third party property, judgments and attorneys' fees arising out of or in connection with the performance by CONTRACTOR pursuant to this Agreement.

6.2 CONTRACTOR shall indemnify CITY for all loss, damage, expense or liability including, without limitation, court costs and attorneys' fees that may result by reason of any infringement or claim of infringement of any patent, trademark, copyright, trade secret or other proprietary right due to services furnished pursuant to this Agreement. CONTRACTOR will defend and/or settle at its own expense any action brought against the CITY to the extent that it is based on a claim that products or services furnished to CITY by CONTRACTOR pursuant to this Agreement, or if any portion of the services or goods furnished in the performance of the service becomes unusable as a result of any such infringement or claim.

6.3 CONTRACTOR'S aggregate liability shall not exceed the proceeds of insurance required to be placed pursuant to this Agreement plus the compensation received by CONTRACTOR, or extend to any claims brought subsequent to the expiration of warranty period outlined above. The CITY's rights and remedies and CONTRACTOR's liabilities as set forth in this Agreement, are exclusive, and the CITY hereby releases CONTRACTOR from all further or subsequent liability, whether based in contract or tort and irrespective of fault, negligence, or strict liability.

6.4 The parties recognize that various provisions of this Agreement, including but not necessarily limited to this Section, provide for indemnification by the CONTRACTOR and that Florida Statutes §725.06 requires a specific consideration be given therefor. The parties therefore agree that the sum of **Ten Dollars and 00/100 (\$10.00)**, receipt of which is hereby acknowledged, is the specific consideration for such indemnities, and the providing of such indemnities is deemed to be part of the specifications with respect to the services to be provided by CONTRACTOR. Furthermore, the parties understand and agree that the covenants and representations relating to this indemnification provision shall serve the term of this Agreement and continue in full force and effect as to the party's responsibility to indemnify.

ARTICLE 7

INSURANCE

Where Contractors are required to enter or go onto the City of Cooper City property (including any property which is owned or leased by the City or upon which the City has a license, easement or right-of-way) to deliver materials or perform work or services as a result of an award, the successful Contractor shall assume the full duty, obligation and expense of obtaining all necessary licenses, permits and insurance and assure all work complies with all applicable Broward County and City of Cooper City building requirements and the Florida Building Code. The Contractor shall be liable for any damages or loss to the City occasioned by negligence of the Contractor or any person the Contractor has designated in the completion of the contract as a result of his or her bid.

The Contractor shall indemnify and hold harmless the CITY and its officers, employees, agents and instrumentalities from any and all liability, losses or damages, including attorneys' fees and costs of defense, which the CITY or its officers, employees, agents or instrumentalities may incur as a result of claims, demands, suits, causes of actions or proceedings of any kind or nature arising out of, relating to or resulting from the performance of this Agreement by the Contractor or its employees, agents, servants, partners principals or subcontractor. The Contractor shall pay all claims and losses in connection therewith and shall investigate and defend all claims, suits or actions of any kind or nature in the name of the CITY, where applicable, including appellate proceedings, and shall pay all costs, judgments, and attorney's fees which may issue thereon. The Contractor expressly understands and agrees that any insurance protection required by this Agreement or otherwise provided by the Contractor shall in no way limit the responsibility to indemnify, keep and save harmless and defend the CITY or its officers, employees, agents and instrumentalities as herein provided.

Contractor shall not commence work under this Agreement until it has obtained all insurance required under this paragraph and such insurance has been approved by the Risk Manager of the CITY nor shall the Contractor allow any subcontractor to commence work on his subcontract until all similar such insurance required of the subcontractor has been obtained and similarly approved.

Certificates of Insurance, reflecting evidence of the required insurance, shall be filed with the City's Risk Manager prior to the commencement of this Agreement. Policies shall be issued by companies authorized to do business under the laws of the State of Florida. The insurance company shall be rated no less than "A" as to management, and no less than "Class VI" as to financial strength according to the latest edition of Best's Insurance Guide published by A.M. Best Company.

Policies shall be endorsed to provide the CITY with notice of cancellation or the Contractor shall obtain written agreement from its Agent to provide the CITY with 30-day notice of cancellation.

Insurance shall be in force until all obligations required to be fulfilled under the terms of the Agreement are satisfactorily completed as evidenced by the formal acceptance by the CITY. In the event the insurance certificate provided indicates that the insurance shall terminate and lapse during the period of this Agreement, then in that event, the CONSULTANT shall furnish, as soon as reasonably practicable, a renewed certificate of insurance as proof that equal and like coverage for the balance of the period of the Agreement and extension thereunder is in effect. The CONSULTANT shall not commence nor continue to provide any services pursuant to this Agreement unless all required insurance remains in full force and effect. CONSULTANT shall be liable to CITY for any lapses in service resulting from a gap in insurance coverage.

Prior to the commencement of the project, Contractor shall provide the City with a certificate of liability insurance and a copy of the additional insured endorsement naming the City of Cooper City its employees, directors, officers, agents, independent contractors, successors and assigns, and other authorized representatives as additional insured on a primary and non-contributory basis to the extent of the contractual obligation assumed by the Proposer. Additionally, the Contractor shall provide the City with a copy of the certificates of insurance and a copy of the additional insured endorsement reflecting the same insurance coverage for all subcontractors utilized by Contractor.

The City shall be granted a Waiver of Subrogation on the Contractor's Workers' Compensation and General Liability insurance policy, and affirmed on the Certificate of Liability Insurance and a Waiver

of Subrogation Endorsement. The Contractor waives, and the Contractor shall ensure that the Contractor's insurance carrier waives, all subrogation rights against the City, its officials, employees, agents and volunteers for all losses or damages.

7.1 REQUIRED INSURANCE

7.1.1 Comprehensive General Liability Insurance written on an occurrence basis including, but not limited to: coverage for bodily injury and property damage, personal & advertising injury, products & completed operations, and contractual liability. Coverage must be written on an occurrence basis, with limits of liability no less than:

1. Each Occurrence Limit - \$1,000,000
2. Fire Damage Limit (Damage to rented premises) - \$100,000
3. Personal & Advertising Injury Limit - \$1,000,000
4. General Aggregate Limit - \$2,000,000
5. Products & Completed Operations Aggregate Limit - \$3,000,000

Products & Completed Operations Coverage shall be maintained for two (2) years after the final payment under this contract.

The City of Cooper City must be shown as an additional insured with respect to this coverage.

7.1.2 Worker's Compensation and Employers Liability Insurance covering all employees, and/or volunteers of the Contractor engaged in the performance of the scope of work associated with this Agreement. In the case any work is sublet, the Contractor shall require the subcontractor similarly to provide Workers Compensation Insurance for all the latter's employees unless such employees are covered by the protection afforded by the Contractor. Coverage for the Contractor and his subcontractor shall be in accordance with applicable state and/or federal laws that may apply to Workers' Compensation Insurance with limits of liability no less than:

- | | | |
|---------------------------|------------|-----------------------------------|
| 1. Workers' Compensation: | Coverage A | Statutory |
| 2. Employers Liability: | Coverage B | \$500,000 Each Accident |
| | | \$500,000 Disease – Policy Limit |
| | | \$500,000 Disease – Each Employee |

7.1.3 Comprehensive Auto Liability Insurance covering all owned, non-owned and hired vehicles used in connection with the performance of work under this Agreement, with a combined single limit of liability for bodily injury and property damage no less than:

1. Any Auto (Symbol 1)
Combined Single Limit (Each Accident) - \$1,000,000
2. Hired Autos (Symbol 8)
Combined Single Limit (Each Accident) - \$1,000,000
3. Non-Owned Autos (Symbol 9)
Combined Single Limit (Each Accident) - \$1,000,000

7.1.4 Professional Liability/Errors & Omissions Insurance, when applicable, with a limit of liability no less than \$1,000,000 per wrongful act. This coverage shall be maintained for a period of no less than two (2) years after final payment of the contract.

7.1.5 Sexual Abuse may not be excluded from any policy.

7.2 REQUIRED INSURANCE ENDORSEMENTS

1. The City of Cooper City shall be named as an Additional Insured on each of the General Liability policies required herein
2. Waiver of all Rights of Subrogation against the CITY
3. 30-Day Notice of Cancellation or Non-Renewal to the CITY
4. Contractors' policies shall be Primary & Non-Contributory
5. All policies shall contain a "severability of interest" or "cross liability" liability clause without obligation for premium payment of the CITY
6. The City of Cooper City shall be named as a Loss Payee on all Property and/or Inland Marine Policies as their interest may appear.

CONTRACTOR shall name the CITY, as an additional insured on each of the General Liability policies required herein and shall hold the CITY, its agents, officers and employees harmless on account of claims for damages to persons, property or premises arising out of the services provided hereunder. Any insurance required of the CONTRACTOR pursuant to this Agreement must also be required by any subcontractor in the same limits and with all requirements as provided herein, including naming the CITY as an additional insured, in any work is subcontracted unless such subcontractor is covered by the protection afforded by the CONTRACTOR and provided proof of such coverage is provided to CITY. The CONTRACTOR and any subcontractors shall maintain such policies during the term of this Agreement. Contractor shall agree to waive all rights of subrogation against the City, members of the City Commission, boards, commissions and committees, officers, agents, employees and volunteers for losses arising from activities and operations of Contractor in the performance of its obligations under this agreement.

The CITY reserves the right to require any other additional types of insurance coverage and/or higher limits of liability it deems necessary based on the nature of work being performed under this Contract.

ARTICLE 8

INDEPENDENT CONTRACTOR

8.1 This Agreement does not create an employee/employer relationship between the parties. It is the intent of the parties that the CONTRACTOR is an independent Contractor under this Agreement and not the CITY's employee for all purposes, including but not limited to, the application of the Fair Labor Standards Act minimum wage and overtime payments, Federal Insurance Contribution Act, the Social Security Act, the Federal Unemployment Tax Act, the provisions of the Internal Revenue Code, the State Workers' Compensation Act, and the State unemployment insurance law. The CONTRACTOR shall retain sole and absolute discretion in the judgment of the manner and means of carrying out CONTRACTOR's activities and responsibilities hereunder provided, further that administrative procedures applicable to services rendered under this Agreement shall be those of CONTRACTOR, which policies of CONTRACTOR shall not conflict with CITY, State, H.U.D., or United States policies, rules or regulations relating to the use of CONTRACTOR's Funds provided for herein. The CONTRACTOR agrees that it is a separate and independent enterprise from the CITY, that it has full opportunity

to find other business, that it has made its own investment in its business, and that it will utilize a high level of skill necessary to perform the work. This Agreement shall not be construed as creating any joint employment relationship between the CONTRACTOR and the CITY and the CITY will not be liable for any obligation incurred by CONTRACTOR, including but not limited to unpaid minimum wages and/or overtime premiums.

ARTICLE 9

VENUE

9.1 This Agreement shall be governed by the laws of the State of Florida as now and hereafter in force. The venue for actions arising out of this agreement shall be in Broward County, Florida.

ARTICLE 10

PUBLIC RECORDS

10.1 The City of Cooper City is public agency subject to Chapter 119, Florida Statutes. The CONTRACTOR shall comply with Florida's Public Records Law. Specifically, the CONTRACTOR shall:

10.1.1 Keep and maintain public records required by the CITY to perform the service;

10.1.2 Upon request from the CITY's custodian of public records, provide the CITY with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in chapter 119, Fla. Stat., or as otherwise provided by law;

10.1.3 Ensure that public records that are exempt or that are confidential and exempt from public record disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and, following completion of the contract, CONTRACTOR shall destroy all copies of such confidential and exempt records remaining in its possession after the CONTRACTOR transfers the records in its possession to the CITY; and

10.1.4 Upon completion of the contract, CONTRACTOR shall transfer to the CITY, at no cost to the CITY, all public records in CONTRACTOR's possession. All records stored electronically by the CONTRACTOR must be provided to the CITY, upon request from the CITY's custodian of public records, in a format that is compatible with the information technology systems of the CITY.

10.2 The failure of CONTRACTOR to comply with the provisions set forth in this Article shall constitute a Default and Breach of this Agreement, for which, the City may terminate the Agreement.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT

**CITY CLERK
9090 SW 50th PLACE
COOPER CITY, FL 33328
(954) 434-4300
PRR@CooperCity.gov**

ARTICLE 11
SCRUTINIZED COMPANIES -- 287.135 AND 215.473

12.1 CONTRACTOR certifies that it and any of its affiliates are not scrutinized companies as identified in Section 287.135, F.S. In addition, CONTRACTOR agrees to observe the requirements of Section 287.135, F.S., for applicable sub-agreements entered into for the performance of work under this Agreement. Pursuant to Section 287.135, F.S., the CITY may immediately terminate this Agreement for cause if the CONTRACTOR, its affiliates, or its subcontractors are found to have submitted a false certification; or if the CONTRACTOR, its affiliates, or its subcontractors are placed on any applicable scrutinized companies list or engaged in prohibited contracting activity during the term of the Agreement. As provided in Subsection 287.135(8), F.S., if federal law ceases to authorize these contracting prohibitions then they shall become inoperative.

ARTICLE 12
E-VERIFY

13.1 Registration Requirement; Termination. Pursuant to Section 448.095, Florida Statutes, 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/sub consultants/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. 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. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. Any challenge to termination under this provision must be filed in the Circuit Court no later than twenty (20) calendar days after the date of termination. Termination of this Contract under this Section is not a breach of contract and may not be considered as such. If this 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 one (1) year after the date of termination.

ARTICLE 13 **MISCELLANEOUS**

13.1 **Ownership of Documents.** Reports, surveys, plans, studies and other data provided in connection with this Agreement are and shall remain the property of CITY whether or not the project for which they are made is completed. City hereby agrees to use CONTRACTOR's work product for its intended purposes.

13.2 **Records.** CONTRACTOR shall keep such records and accounts and require any and all subcontractor to keep records and accounts as may be necessary in order to record complete and correct entries as to personnel hours charged to this engagement, and any expenses for which CONTRACTOR expects to be reimbursed. Such books and records will be available at all reasonable times for examination and audit by CITY and shall be kept for a period of ten (10) years after the completion of all work to be performed pursuant to this Agreement. Incomplete or incorrect entries in such books and records will be grounds for disallowance by CITY of any fees or expenses based upon such entries. All records shall be maintained and available for disclosure, as appropriate, in accordance with Chapter 119, F.S.

13.3 **Assignments; Amendments.** This Agreement, and any interests herein, shall not be assigned, transferred or otherwise encumbered, under any circumstances, by CONTRACTOR without the prior written consent of CITY. For purposes of this Agreement, any change of ownership of CONTRACTOR shall constitute an assignment which requires CITY approval. However, this Agreement shall run to the benefit of CITY and its successors and assigns.

It is further agreed that no modification, amendment, or alteration in the terms or conditions contained herein shall be effective unless contained in a written document executed with the same formality and of equal dignity herewith.

13.4 **No Contingent Fees.** CONTRACTOR warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for CONTRACTOR to solicit or secure this Agreement, and that it has not paid or agreed to pay any person, company, corporation, individual or firm, other than a bona fide employee working solely for CONTRACTOR any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award or making of this Agreement. For the breach or violation of this provision, CITY shall have the right to terminate the Agreement without liability at its discretion, to deduct from the contract price, or otherwise recover the full amount of such fee, commission, percentage, gift or consideration.

Notice. Whenever any party desires to give notice unto any other party, it must be given by written notice, sent by email or certified United States mail, with return receipt requested, addressed to the party for whom it is intended and the remaining party, at the places last specified, and the places for giving of notice shall remain such until they shall have been changed by written notice in compliance with the provisions of this section. For the present,

Contractor and City designate the following as the respective places for giving of notice:

CITY:

- a) to the Project Manager
Michael Cobelo
City of Cooper City, Communication Department
9090 S.W. 50th Place
Cooper City, Florida, 33328-4227

Telephone No. (954) 434-4300 X 228
Email: MCobelo@CooperCity.gov

and,

b) to the Contract Manager
Tyrone White
City of Cooper City, Procurement
9090 S.W. 50th Place
Cooper City, Florida 33328-4227
Telephone No. (954) 434-4300 X 268
Email: Purchasing@CooperCity.gov

Copy To:

Jacob G. Horowitz, City Attorney
Goren, Cherof, Doody & Ezrol, P.A.
3099 East Commercial Boulevard, Suite 200
Fort Lauderdale, Florida 33308
Telephone No. (954) 771-4500
Email: JHorowitz@gorencherof.com

CONTRACTOR:

Global Solutions Group, Inc.
Attn: Lisa Salvador, Vice President
25900 Greenfield Road, Suite 220
Oak Park, MI 48237
Telephone No. (248) 2991-5440
Email: lisas@globalsolgroup.com

13.5

13.6 **Binding Authority.** Each person signing this Agreement on behalf of either party individually warrants that he or she has full legal power to execute this Agreement on behalf of the party for whom he or she is signing, and to bind and obligate such party with respect to all provisions contained in this Agreement.

13.7 **Headings.** Headings herein are for convenience of reference only and shall not be considered on any interpretation of this Agreement.

13.8 **Appendixes.** Each Appendix referred to in this Agreement forms an essential part of this Agreement. The appendixes if not physically attached should be treated as part of this Agreement and are incorporated herein by reference.

13.9 **Severability.** If any provision of this Agreement or application thereof to any person or situation shall to any extent, be held invalid or unenforceable, the remainder of this Agreement, and the application of such provisions to persons or situations other than those as to which it shall have been held invalid or unenforceable shall not be affected thereby, and shall continue in full force and effect, and be enforced to the fullest extent permitted by law.

13.10 **Extent of Agreement.** This Agreement represents the entire and integrated agreement between the CITY and the CONTRACTOR and supersedes all prior negotiations, representations or agreements, either written or oral.

13.11 **Legal Representation.** It is acknowledged that each party was represented by counsel in the preparation of and contributed equally to the terms and conditions of this Agreement and, accordingly, the rule that a contract shall be interpreted strictly against the party preparing same shall not apply herein due to the joint contributions of both parties.

13.12 **Counterparts and Execution.** This Agreement may be executed in multiple originals or counterparts, each of which shall be deemed to be an original and together shall constitute one and the same agreement. Execution and delivery of this Agreement by the Parties shall be legally binding, valid and effective upon delivery of the executed documents to the other party through facsimile transmission, email, or other electronic delivery.

END OF SECTION

REMAINDER OF PAGE INTENTIONALLY LEFT BLANK

IN WITNESS OF THE FOREGOING, the parties have set their hands and seals the day and year first written above.

CITY:

CITY OF COOPER CITY, FLORIDA

ATTEST:

TEDRA ALLEN, CITY CLERK


By: _____
ALEX REY, CITY MANAGER

APPROVED AS TO FORM:

OFFICE OF THE CITY ATTORNEY

CONSULTANT:


WITNESSED BY:



Signature
Sahil Shah

Print Name

Global Solutions Group Inc., a Foreign Profit Corporation

By: 

Name: Lisa Salvador

Title: Vice President

STATE OF Michigan
COUNTY OF Oakland

BEFORE ME, an officer duly authorized by law to administer oaths and take acknowledgments, personally appeared Lisa Salvador as Vice President of Global Solutions Group, Inc., a foreign profit company authorized to conduct business in the State of Florida, and acknowledged execution of the foregoing Agreement as the proper official of Global Solutions Group, Inc. for the use and purposes mentioned in it and affixed the official seal of the corporation, and that the instrument is the act and deed of that corporation.

IN WITNESS OF THE FOREGOING, I have set my hand and official seal at in the State and County aforesaid on this 3rd day of June, **2025**.



NOTARY PUBLIC

Randolph Burbach
(Name of Notary Typed, Printed or Stamped)

RANDOLPH BURBACH
NOTARY PUBLIC, MICHIGAN
COUNTY OF WAYNE
My Commission Expires 08/24/2025
Acting in the County of Oakland

Appendix A – Scope of Services

1. GENERAL INFORMATION

The City of Cooper City ("City") requests proposals from qualified Vendors to obtain software and assistance in the implementation, migration, and deployment of a city-wide enterprise Document Management System ("DMS"). City is requesting prospective Vendors to focus on the needs of the City to improve its records management, retention, indexing, work flow, document access, and retrieval of documents created and utilized by City administration. The goal is to implement a system that stores digital images quickly and effectively for later retrieval by securely defined user(s) or group access. The system should support archival permanency with the ability to migrate records to other mediums (hardware or software) for the full retention of a record and be able to retrieve or remove records by date, type or number range. The system must be able to export the digital information into various formats, and to allow quick, easy, and timely retrieval of records and information as needed. The system should have the ability to control the authoring, checkin/ out, and version control of documents being developed, managed or stored. It should also give users the ability to index or enter the "metadata" associated to the documents being entered into the system.

All parts, items, service details, or features not identified which are regularly furnished to complete this type of work will be furnished at proposed pricing and shall conform in quality, workmanship and service to that usually provided by the best practices as specified in this Request for Proposal ("RFP").

2. BACKGROUND

The City of Cooper City ("City") is a municipal corporation created by a Special Act of the Florida Legislature on June 20, 1959. Cooper City was founded by Morris Cooper who was able to turn a few acres of orange groves and cattle grazing land into a stable and beautiful community.

Located approximately 15 miles southwest of Fort Lauderdale, this 8.5 square mile bedroom community has the fourth highest median household income in Broward County. With an estimated population of 34,401 in 2020, the average age of all residents is approximately 40 years old.

The City currently uses a document management system, DocuWare. However, many departments currently maintain their department records electronically. It is not uncommon to have multiple copies of the same document in various locations. The Document Management System (DMS) must be scalable to support the inclusion of existing electronic documents into the system and to allow paper documents to be scanned and imported into the system. In general, users need easier retrieval of information, search tools to locate the information, and a workflow solution to efficiently process and route documents. The City wants to archive records for a specified period of time and scan them into a DMS. The DMS shall include document imaging, management, indexing, searching, workflow, archiving, and retention capabilities. The DMS is intended to improve the City's business processes, provide additional protection for records, and enhance availability of records to the public.

3. SCOPE OF SERVICES/TECHNICAL SPECIFICATIONS

The City of Cooper City is seeking the option to host the DMS by a Cloud/Based/SaaS Content Services Platform (CSP), with the ability to access the system 24/7 from any place on any platform (i.e. Windows, Mac, Android, iOS, etc.). The City will store all documents/records in a central digital repository. The selected firm will supply a reliable high performance electronic document management system meeting all the needs of City Administration.

1. Allow for easy retrieval of necessary documents by City administration using document management solutions desktop client or website.
2. Implement systems solutions to scan, index, store, search, and backup paper files.
3. Automate processes to route, manage and control documents, document versions, and records.

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

3.1 Products and Services. The Contractor should offer the following services, equipment, materials and products that are new, of good quality and free of defects.

3.1.1 Discovery. Discovery/Assessment of Existing Records, Document Management System, and Policies/Procedures shall include discovery/assessment sessions in order to develop a detailed assessment and strategic roadmap for a comprehensive Document/Records Management Program.

3.1.2 Warranty

Proposal should address the following warranty information:

- Applicable warranty and/or guarantees of equipment and installations including any
- conditions and response time for repair or replacement of any components during the
- warranty period.
- Availability of replacement parts.
- Life expectancy of equipment under normal use.
- Detailed information as to proposed return policy on all equipment

3.1.3 Construction

- Vendor shall perform services in a good and workmanlike manner and in accordance with industry standards for the service provided.

3.2 Tasks. Contractor shall perform the following 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.

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

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

D. Current taxonomy and metadata implemented.

E. Existing data inventory systems from offsite record storage providers.

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

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.

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

I. Areas of potential record duplication.

3.3 Document Management System Capability. Contractor's system should propose a Cloud Based/SaaS Content Services Platform (CSP):

- A.** Be Compatible with all modern web browsers (Edge, Firefox, Chrome, Safari, etc.)
- B.** Utilize a mobile-friendly, responsive design that is compatible on iOS and Android Mobile devices
- C.** Allow City System Administrator to configure role-based permissions and individual user permissions.
 - 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.
- 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.
- 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.
- 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.
- G.** Have option for cloud-based storage
- H.** Allow City to retain ownership of the data stored on the platform and the ability to extract it in full at any time. **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).
- J.** Be easy to navigate, user-friendly user interface.
- K.** Allow for add-on for Microsoft Office Integration to enable import of emails directly into system.
- L.** Allow for files can be uploaded by using a drag-and-drop system.
- M.** Allow Application administrator to upload document templates for use by users.
- N.** Enables storage of application presentation documents, such as PowerPoint files, photographs and videos.
- O.** Identify duplicate documents within a folder.
- P.** Records Management Module to allow for assigning and tracking retention for files.

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

Q. Audit Trail Module to track and report on events in the CSP.

3.4 Functional and Technical Requirements

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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). |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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 |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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 |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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 |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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, |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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 |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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. |

RFP 2024-4-CC, DOCUMENT MANAGEMENT SYSTEM

| 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 |

RFP 2024-4-CC - DOCUMENT MANAGEMENT SYSTEM

| 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. |

3.5 Public Portal Interface. The Public Portal Interface should address the following requirements in read only access:

- A. Include a count of the total number of documents in a folder.
- B. Enable the downloading and printing of documents.

RFP 2024-4-CC - DOCUMENT MANAGEMENT SYSTEM

C. Allow Administrator to redact sections of documents from public view if needed. Printed and downloaded documents include the redaction in the downloaded version.

D. Ability to generate hyperlinks to specific documents within the system to allow these to be used in reports, emails, etc.

E. Ability to select different languages and/or photos within the interface.

F. ADA Compliant Interface.

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.

3.6 Reporting and Management. The Electronic Document Management System should meet the following requirements:

A. System generates reports of number of documents accessed, imported, uploaded, edited and deleted. Results can be refined by user.

B. System collects information on when documents are accessed/viewed/modified and downloaded.

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.

3.7 Testing. The Contractor shall complete all necessary implementation work in a professional manner that meets the requirements of the City. The Contractor shall ensure that system is correctly configured to meet all City functional requirements. Contractor shall coordinate functional testing to ensure accuracy of configurations. Work shall commence within receipt of notice to proceed.

3.8 Training. The Contractor shall provide resources experienced with developing and executing training plans, including content development and delivery, to assist the City in meeting end-user training needs. Implementation shall occur in phases and knowledge transfer shall be an ongoing process throughout the entire project. The Contractor shall provide knowledge transfer both verbally and through written documentation and procedures.

System Administrator Training to include:

- User Management & Security
- Monitoring User Activity
- Licensing
- Cloud Navigation
- Metadata Management
- General System Settings
- Folder Security
- Audit Trail
- Troubleshooting Overview

RFP 2024-4-CC - DOCUMENT MANAGEMENT SYSTEM

- End user Training to include:
- File Import Options & Scanning
- Search & Retrieval
- Metadata Usage & Reports
- User Navigation
- Export Options
- OCR & Generating Text

3.9 Deliverables. Contractor should develop the following deliverables in the assessment of the City's current system and proposed solution:

A. Work Plan/Timeline: Provide work timeline with estimated days/hours required to complete the Discovery/Assessment of Existing Records, System, and Procedures.

B. Findings Report with comprehensive findings resulting from the assessment/evaluations and onsite meeting completed.

C. Key Stakeholder Meeting: Conduct one on-site presentation of the gap analysis findings identified from the assessment/evaluations and onsite meetings to the City's identified project team.

D. Suggested retention processes that are applicable across various record generating processes and systems.

E. Include costs and strategies for implementing such automated processes across different enterprise systems.

F. A reduction of impacts to existing and future document users and resources, including processes that access, use, generate, store or destroy documents (including minimizing new requirements, responsibilities and processes related to managing documents).

G. Recommendations on maximizing the availability and accessibility of documents for business and transparency purposes.

H. Recommendations on minimizing the long-term costs associated with managing documents of all forms, including costs associated with onsite and offsite document filing, storing and retrieving, as well as storing and backing up electronic documents.

I. Recommendations on minimizing City's liability associated with retaining and destroying documents and comply with applicable regulations and laws.

J. Document destruction, transference and conversion guidelines.

K. Identify space (internal or external) and equipment necessary for filing records. Determine if offsite records storage can be reduced for cost reduction for the City.

RFP 2024-4-CC - DOCUMENT MANAGEMENT SYSTEM

L. General guidance on executing strategies for successful adoption of new policies, processes and procedures.

M. Recommendations for change management, training and other ongoing program management activities such as self-auditing.

N. Additional recommendations as needed.

O. Work Plan/Schedule for recommendations and strategies (including milestones and phases)

4. VALUE ADDED PRODUCTS OR SERVICES

The City may evaluate certain related value-added products or services to determine if cost-saving benefits might be derived from including these in the Scope of Work. Interested proposers may add any such value-added products or services to their response, provided they have the capacity and experience to do so.

Appendix B – Scope of Services

Software Licensing

| Item Description | Unit Cost | Quantity | Total Cost |
|---|--------------------------------|----------|---------------------------------|
| DMS Software License (Per User) | \$ 747.00 | 8 | \$5,976.00 |
| Annual Maintenance Fee | \$included in per user license | - | \$ included in per user license |
| Laserfiche Participant (Read-Only) | \$ 108.00 | 8 | \$864.00 |
| Public Portal (Up to 1,000) | \$600.00 | 1 | \$600.00 |
| Laserfiche Records Management | \$5,750.00 | 1 | \$5,750.00 |
| Advanced Audit Trail | \$2,875.00 | 1 | \$2,875.00 |
| Subtotal | | | \$16,065.00 |

Implementation Services

| Item Description | Unit Cost | Quantity | Total Cost |
|--|-----------|----------|-------------|
| Initial Setup and Configuration | \$165.00 | 40 | \$6,600.00 |
| Data Migration | \$ 150.00 | 40 | \$6,000.00 |
| Customization (Per Hour) | \$ 165.00 | 20 | \$3,300.00 |
| Training (Per Session) | \$ 400.00 | 4 | \$1,600.00 |
| Project Management | \$ 175.00 | 40 | \$7,000.00 |
| | \$- | - | \$- |
| | \$- | - | \$- |
| Subtotal | | | \$24,500.00 |

Support and Maintenance

| Item Description | Unit Cost | Quantity | Total Cost |
|-------------------------------------|---------------------------------|------------------------------|---------------------------------|
| Technical Support (Per Hour) | \$ included in per user license | included in per user license | \$ included in per user license |
| Annual Support Package | \$ included in per | included in per user | \$ included in per user |

RFP 2024-4-CC - DOCUMENT MANAGEMENT SYSTEM

| | | | |
|------------------------------------|---------------------------------|------------------------------|---------------------------------|
| | user license | license | license |
| System Upgrades and Updates | \$ included in per user license | included in per user license | \$ included in per user license |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| Subtotal | | | \$ |

Value-Added Products or Services

| Item Description | Unit Cost | Quantity | Total Cost |
|--|------------|----------|------------|
| Laserfiche Public Portal Upto 10,000 Views Per Month (Allows External users to view documents in read-only mode) | \$4,200.00 | 1 | \$4,200 |
| Laserfiche Forma Portal – Upto 1,000 Submissions Per Month (Allows External users to submit forma processes) | \$1,800.00 | 1 | \$1,800.00 |
| Laserfiche Forma Portal – Upto 10,000 Submissions Per Month (Allows External users to submit forma processes) | \$4,400.00 | 1 | \$4,400.00 |
| Laserfiche 50K | \$1,220.00 | 1 | \$1,220.00 |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| Subtotal | | | \$ |

Total Cost Summary

| Cost Category | Total Cost |
|---------------------------|-------------|
| Year 1 | |
| Software Licensing | \$16,065.00 |

RFP 2024-4-CC - DOCUMENT MANAGEMENT SYSTEM

| | |
|--------------------------------------|--------------------|
| Implementation Services | \$24,500.00 |
| Support and Maintenance | \$- |
| Year 1 Total | \$40,565.00 |
| Year 2 | |
| Software Licensing | \$16,546.95 |
| Support and Maintenance | \$6,798.00 |
| Year 2 Total | \$23,344.95 |
| Year 3 | |
| Software Licensing | \$17,043.36 |
| Support and Maintenance | \$7,001.94 |
| Year 3 Total | \$24,045.30 |
| | |
| Grand Total (Years 1,2,3) | \$87,955.25 |
| | |
| Value-Added Products/Services | \$11,620.00 |