

Laserfiche[®]

Run Smarter[®]

Enterprise Content Management System

Prepared for: State of Montana ITSD
In Response To: Enterprise Content Management System RFI

Laserfiche Solutions Group
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Montana Department of Administration
State Information Technology Services Division
P.O. Box 200113
125 N. Roberts
Helena, MT 59602

Ms. Burchett:

The Laserfiche Solutions Group (LSG) has prepared this proposal in response to the State of Montana's RFI exploring options for an Enterprise Content Management Solution. Compulink Management Center Inc. (DBA Laserfiche) is the developer of the award winning Laserfiche® enterprise content management solution - as well as a respected systems integrator and consultancy. We believe that Laserfiche Rio is the ideal solution to serve the State of Montana's goal of adopting a content management solution which is deployable in a variety of state departments. Without a doubt, Laserfiche has the ability to serve as the foundational technology which will help drive operational improvement throughout all state departments.

Laserfiche Rio, the foundation of the proposed solution, is developed and licensed to be implemented as a core infrastructure technology. The system bundles functionality and provides the means for a centralized approach to data retention so that all departments have access to the information while maintaining the data integrity and security sought by the State of Montana Information Technology Services Division. Laserfiche also provides the ability to deploy multiple production, test, development, and training systems to meet high availability, disaster recovery, and changing development needs.

While most Laserfiche solutions are sold and implemented through authorized resellers, the Laserfiche Solutions Group selectively bids on projects of strategic importance. We undoubtedly view the State of Montana as a potential partner of strategic significance and we treat these strategic relationships as long-term, mutually beneficial partnerships. These partnerships give our customers the benefit of working directly with the software developer and provides the Solutions Group the opportunity to

receive real-world feedback as we continue to improve the way our solutions meet the needs of organizations like the State of Montana. We understand that local support and expertise is as important as working with the software developer so, it is important to note that we are able to draw from our well-established network of local solution providers. This approach of deploying and supporting solutions allows for a “best of breed” ECM deployment and support structure for the State of Montana.

Laserfiche is the ECM solution of choice for a number of government agencies at all levels- including the Teachers Retirement System of the State of Illinois and the New York City Board of Education. Over the years, we have put a lot of emphasis on understanding the business processes within these organizations allowing us to provide a solution which integrates with common and homegrown applications.

Our proposal follows the format proscribed in the RFP as closely as possible, and we have tried to be concise in our responses. We would be pleased to discuss any aspect of this proposal to provide additional information related to our proposed solution or ability to deliver, if requested. We look forward to providing a comprehensive demonstration that highlights the real-world benefits Laserfiche will provide on a daily basis.

Regards,
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Table of Contents

Executive Summary.....	5
Company Qualifications.....	7
Company Background.....	7
Similar Projects and Customer References.....	9
Teachers’ Retirement System of the State of Illinois.....	10
Office of the State Attorney, 13th Judicial Circuit.....	12
Ramsey County, MN.....	13
New York City Board of Education.....	14
City of Long Beach, CA.....	15
Solution Overview.....	16
Laserfiche Rio ECM.....	16
Data Conversion.....	17
Software Modules.....	20
Laserfiche Client.....	20
Search Tools.....	21
Scanning Interfaces.....	22
Quick Fields.....	22
Laserfiche Forms.....	24
Laserfiche Workflow.....	25
Laserfiche Web Access.....	26
Laserfiche Mobile.....	27
Public Portal.....	28
Transparent Records Management.....	29
Licensing Options.....	30
Estimated Costs.....	31
Software Licensing Acquisition Costs.....	31
Annual Laserfiche Software Assurance Plan Licensing Maintenance.....	31
Laserfiche Rio Volume Discount Pricing Tiers.....	32



Professional Services and Training..... 33
 Professional Services and Training Rates..... 33
Document Imaging Specifications..... 34
Content Management Specifications..... 38
Automated Workflow Specifications 46
Records Management Specification 49
E-Form Specifications..... 58



Executive Summary

The State of Montana Information Technology Services Division (ITSD) is in the process of evaluating vendors in hopes of eventually adopting a state-wide enterprise content management solution. This evaluation process will likely lead the state to adopt a long-term partnership with a well-established vendor to design and implement the ECM solution the organization has envisioned. The selected solution will allow The State of Montana ITSD to continue providing excellent technical support to its state agencies while facing increasing requests from customers and budget scrutiny.

In pursuit of this objective, the state must seek a solution which is easy to deploy and manage, but which also speaks to the needs articulated by the several state agencies the ITSD services. To properly address the needs of the various state agencies, the ITSD must provide robust document capture, record keeping, electronic forms and business process automation capabilities- all while offering flexibility, extensibility and the choice of multiple user-friendly interfaces designed to meet the specific needs of a diverse user community. In order for the State of Montana to realize the cost savings and efficiencies associated with enterprise content management (ECM) solutions, the system must be embraced and utilized by all users. This means that interface design and the end user's experience will be just as important as overall system capabilities. An ideal solution will empower users to continuously refine and improve their business processes with highly flexible tools, not limit departmental processes to an industry defined lowest common denominator of software functionality. The use of a complete ECM solution like Laserfiche, which bundles a complete suite of highly configurable, state of the art tools, the State of Montana will be able to provide the significant boost in functionality and deployment flexibility that the state needs.

Currently, the State of Montana ITSD is limited by a patchwork of legacy ECM solutions and being forced to support an environment which is not scalable. The State of Montana ITSD wants to be able to offer a true enterprise expansion- optimized for all of state's various departments. This endeavor is of the utmost importance because cost of implementing, expanding and maintaining multiple solutions is untenable and the need for competencies in multiple platforms is not scalable. The ITSD is consistently asked to provide better services while also having its' annual budget scrutinized and cut short. In light of these realities, the selection of a system that automates processes, captures information electronically, integrates with existing systems, is easy to use and scalable statewide is of upmost importance to the Montana ITSD fulfilling its mission.

While pursuing this goal, the State of Montana ITSD has many potential challenges to consider. Trying to implement one system based on just the needs of the pilot agency that cannot grow is a potential pitfall. On the other hand, attempting to undertake an initial deployment involving every single agency will take too much time, leading to the ECM solution never getting fully deployed. There are also the ever-present risks of the independent agencies giving up too much autonomy by using an inflexible, standardized solution- or central IT employing central control over all systems to mitigate risk, without



regard to the end user experience. Laserfiche understands these issues, and offers a solution that will serve as a long-term replacement for existing systems and will be implemented as a scalable, centralized platform that is accessible from every facility distributed across the state. The nature of the content that will be managed by the system and the regulatory requirements governing their safekeeping mandates a system that provides the necessary security, auditing and record keeping controls and can ensure the long-term integrity of every document it manages. The large and diverse community of users requires the system to be flexible, easy to use and highly configurable to meet the specific needs of each business unit while enforcing enterprise governance standards. Because of our expertise guiding customers through these processes, the Laserfiche Solutions Group is an ideal partner to guide the State of Montana ITSD through this transition.

To best serve the needs of the State of Montana, the Laserfiche Solutions Group seeks to deploy a Laserfiche Rio solution that was designed specifically for this type of environment. Our eventual offering will bundle highly configurable functionality, unlimited deployment of server components, distributed capture and centralized processing, distributed administration of systems and central control of overall system topology. If selected, the Laserfiche Solutions Group will work in partnership with the State of Montana to develop a marketing plan based on regular workshops, training sessions, the creation of a “community of practice” and other community based events to drive mass adoption. If the state of Montana decides to become a direct client, Laserfiche will also work directly with the State over the long term to ensure their changing needs are addressed in our future product development roadmap.

Through careful consideration of the identified needs of the various State of Montana departments and the ITSD, we are confident that our experience, the flexibility of Laserfiche RIO and our long-term commitment to developing tailored solutions for government agencies makes us uniquely qualified to provide the ideal content management solution for the State of Montana. We are also uniquely equipped to handle potential change management for the state- we have performed large-scale conversions of legacy systems and know how to maintain the appropriate level of familiarity while introducing new functionality and offering a fresh approach to interface design. Additionally, we’ve learned how to push integrations with other applications to the background so users can focus on their work and aren’t responsible for triggering communication between multiple systems.

We believe that our experience, subject matter expertise, and our quality ECM solution should make Laserfiche the front runner for the State of Montana ITSD as it continues to evaluate options for a statewide ECMS. Laserfiche designed and developed all of the highlighted solution elements that we lay out in our response to this RFI - The fact that these products address all of the needs addressed in the state’s ECM questionnaire is a testament to our long-term vision. We look forward to discussing the merits of our solution as the state moves further through the process and we are also hopeful to demonstrate the software we have highlighted in the near future.

Company Qualifications

Company Background

Compulink Management Center, Inc (DBA Laserfiche) is a privately held corporation with world headquarters located in Long Beach, California. The company was founded in 1976 by Nien-Ling Wacker, who remains the current President and CEO, as a custom software developer and has been expanding the Laserfiche product line since 1987. Since the product was made commercially available in 1988, Laserfiche has pioneered several technologies in the content management field as the company has continuously grown. Implemented in more than 33,000 organizations worldwide, Laserfiche products have been trusted to solve the content management needs of customers in a large variety of industries and environments over the last 25 years.

The company's senior management team has been intact for more than 10 years providing stability, guidance and long term product development vision. Laserfiche has not been acquired, has not received or sought venture funding and has maintained consistent growth and profitability.

The company's headquarters in Long Beach, California house the primary research and development, marketing, domestic sales and technical support teams. The Long Beach office currently employs 225 people with more than 50% of them serving in an engineering role. Throughout its history, Laserfiche has continued to grow and is currently expanding domestically and internationally. In 2001, the company launched Laserfiche International in Luxemburg and Hong Kong to accelerate the growth of international business. In the first quarter of 2011, the company opened offices in Ontario, BC, London, England, Fort Lauderdale, FL and Washington D.C.

Laserfiche solutions are primarily sold and implemented through a worldwide network of certified resellers. This approach has provided Laserfiche with a global reach and allowed the company to focus on developing simple, elegant document management solutions that help organizations run smarter. While resellers are a the standard approach to providing our solutions Laserfiche does maintain direct relationships with select clients. The Laserfiche Solutions Group is the specialized team of technical experts who deploy quality enterprise document management solutions in support of clients the company considers "strategically important". As a software developer, Laserfiche dedicates itself to a strong reputation for incorporating customer feedback from these strategic deployments into our product offerings. Laserfiche views these opportunities as long term partnerships where we receive valuable feedback to continuously improve our software, while our customers have the opportunity to collaborate directly with our software developers.

In fulfilling its strategic mission, the Laserfiche Solutions Group has created a significant footprint with strategic government clients – including several state agencies. Laserfiche has consistently been a top choice for government agencies; our powerful tools, deployment flexibility, and project management



experience make us an attractive choice for IT departments from a wide cross-section of the public service community. We are confident that this wide range of experience makes the Laserfiche Solutions Group an ideal partner for Montana's state-wide ECM deployment.



Similar Projects and Customer References

The Laserfiche Solutions Group has extensive experience working with Government institutions, managing implementations at the Local, State and Federal level of government. The projects listed on the following pages represent a sampling of the implementations that we have managed for our government clients, and this list is by no means exhaustive.

Through reviewing this RFI, the Laserfiche Solutions Group understands the State's ultimate objective: to deploy a quality ECM solution that has the flexibility to be effective in a variety of state departments and agencies. This will allow the state to leverage a centralized IT infrastructure and a standardized purchasing process, while giving each state department a solution optimally configured to meet their needs. Our goal with this collection of project summaries and references is to demonstrate our ability to fit a department of any size, and to highlight our track record of providing our government clients the exact solution to address their unique needs. Above all, this collection of project references should serve to demonstrate the deployment flexibility Laserfiche will bring to the State of Montana.



Teachers' Retirement System of the State of Illinois

2815 West Washington
Springfield, IL 62702

TIMELINE: July 2012 – present

CONTACT: Kevin DeGroot, Technical Services Manager

PHONE/EMAIL: (217) 753.0983 / kdegroot@trs.illinois.gov

DESCRIPTION: **Organization:** State Agency with 200 employees managing a public pension plan servicing nearly 200,000 active members and over 100,000 inactive members.

Laserfiche is currently installed as a foundational component of the TRS IT infrastructure, enabling a shared services approach to complete lifecycle management of agency records and automation of business processes. Fundamental to TRS' selection of the Laserfiche Rio platform and the success of the project was the ease of integration with its internally developed member benefit management system, STAR. As TRS always intended on owning the day to day management of the Laserfiche application in-house, the Laserfiche system was deployed by the Laserfiche Solutions Group working in conjunction with TRS' very capable IT staff. Along the way, the Laserfiche Solutions Group provided in-depth training and complete knowledge transfer that allowed TRS IT to take the lead in project development months ahead of schedule.

MIBD Workflow

In addition to automating record classification and routing to the appropriate retention folder, the time consuming process of capturing and validating the high volume of Member Information and Beneficiary Designation (MIBD) Forms was transformed within the initial project pilot. TRS receives an average of 2,000 MIBDs per week and roughly 30% are incorrect; missing signatures, incomplete or incorrect information are just a few of the inaccuracies. Previous to Laserfiche,



there was virtually no oversight to the process and as a result, optimal customer service wasn't possible. By automating the capture and indexing of MIBDs and routing of these documents to TRS process participants, the system has replaced the stack of papers on employees' desks with virtual work queues in Laserfiche that enforce document access protocol and provide comprehensive managerial and audit oversight. Now, if a form is found to contain inaccuracies, it can be automatically emailed to the member for completion and a placeholder in Laserfiche provides any permitted TRS worker the ability to see the status of the submission in the case that they receive a call from the member requesting information. Once a complete and accurate MIBD is verified and approved in Laserfiche, it is automatically routed to the appropriate retention folder and a shortcut is placed in the member folder. Additionally, the programmatic communication between Laserfiche and STAR effectively eliminates dual entry by users as Laserfiche can query any information available in STAR at multiple steps within the process. Security is also kept consistent across both systems through regular synchronization.



Office of the State Attorney, 13th Judicial Circuit

419 Pierce Street
Tampa, FL 33602

- PROJECT:** Enterprise Content Management
- TIMELINE:** April 2006 – present
- CONTACT** J. Eric Thomas, MCSE, CCNA,CCA
Chief Technology Officer
- PHONE/EMAIL:** (813) 274-1911 / thomas_e@sao13th.com
- DESCRIPTION:** **Organization:** Government agency with multiple divisions, diverse records keeping requirements, and subject to Florida’s Sunshine public records laws.

The Laserfiche ECM and R&S middle-ware are utilized to supplement the vast majority of paper flow throughout the 13th SAO enterprise, resulting in minimized costs, better customer service for department and court users, and better time management for staff. A large majority of the intake documents to ‘start a case’ are based on ‘Incident Reports’ generated by local law enforcement agencies, e.g., City of Tampa Police, Hillsborough County Sheriff, and Temple Terrace City Police. Using Laserfiche ECM Workflow, the CMS processes a full case file from the moment of ‘Opening’ (the case) all the way throughout the following processes: Intake/ Filing/ Administration/ Assignment/ Clerk/ Attorney/ Discovery/ Court and lastly, ‘Disposition’ and Archival

R&S Integrated implemented a multi-level Laserfiche ECM integration with 13th SAO work processes and programs for managing court case files and related records. The Laserfiche ECM is tightly integrated with the 13th SAO’s CMS - Case Management System using Laserfiche Enterprise Workflow. A custom portal was developed to provide a simple intuitive browser interface that intuitively guides the user through rules-based workflows incorporating role and classification assignment, records processing and management, and exception-driven processes.





Ramsey County, MN
121 7th Place E Suite 2300
Saint Paul, MN 55101

PROJECT: Enterprise Content Management
TIMELINE: January 2010 – present
CONTACT: Rochelle Waldoch - Compliance and Records Manager
PHONE/EMAIL: (651) 266-3427 / Rochelle.waldoch@co.ramsey.mn.us
DESCRIPTION:

Organization: County government with approx. 4,000 employees servicing more than 500,000 residents.

Laserfiche is currently installed in more than 26 departments at Ramsey County including; Public Health, Human Services, Finance, HR, Elections, Corrections, County Attorney, County Board, Sheriff, and Regional Rail. The system was deployed by the Laserfiche Solutions Group working in conjunction with a local authorized Laserfiche reseller. Laserfiche provided services; needs analysis, project plan development, hardware architecture planning support; configuration, workflow design, testing, and training. Ongoing maintenance, support, and assistance to extend the functionality of the system to new departments and applications is provided as a joint effort of the Laserfiche Solutions Group and our local reseller.

Case Management Workflow

The system was piloted specifically to facilitate case management along with the County's line of business application, Maxis. Case management was chosen as the first project because it represents a repeatable process that can be deployed to multiple departments with minor changes. The Case Management Workflow begins with a County resident (client) that is requesting assistance from the County on a particular matter (childcare, healthcare, etc.). The client is required to make an appointment with an intake worker to verify that certain requirements are met (employment, income, etc.). If the client qualifies, a case is opened in Laserfiche and Maxis. Any supporting documentation provided by the client is scanned into the case created in Laserfiche. If any required documentation is missing, the intake worker will trigger a wait condition in Laserfiche workflow regarding this particular client and how much additional time they have to submit the correct information. E-forms are being used to allow for the electronic submission of documents into the Laserfiche database to make it as easy as possible for clients to submit required documentation.





New York City Board of Education

52 Chambers Street
New York, NY 10007

PROJECT: Enterprise Content & Records Management
100,000 named full users

TIMELINE: March 2009 – present

CONTACT: Joseph Licata, Project Manager

PHONE/EMAIL: JosephLicata@maximus.com

DESCRIPTION: The New York City Board of Education is the governing body of the largest school system in the world with over 1.1 million students taught in more than 1,700 separate schools. With this high population of students, the sheer volume of records is immense. The special needs segment of this student population is closely monitored to ensure they are receiving the appropriate resources through the Individual Education Plan process. The Department receives federal funding to support these programs which require a high degree of compliance oversight.

NYCBOE contracted for implementation of a fully integrated solution to meet the IEP process needs of its students and various compliance requirements. Two main solution elements were TIENET's automated IEP tracking system and Laserfiche Rio RME for records management and document workflow. On a daily basis, thousands of student records are automatically indexed and imported to the Laserfiche system where a series of workflows automatically route them to the appropriate Laserfiche records management retention folders and provide document access for faculty and administration (non-records staff) users through a logical folder structure based on school and student or encoded URLs displayed within the student information system. The Laserfiche infrastructure is hosted by Verizon in Sacramento, CA with a failover datacenter in Phoenix, AZ, and each of these environments is included natively within the Laserfiche Rio deployment model of unlimited environments.





City of Long Beach, CA

333 West. Ocean Blvd.
Long Beach, CA 90802

PROJECT: Enterprise Content Management

TIMELINE: July 2009 - current

CONTACT: Jerry Wada, IT Administrator

PHONE/EMAIL: (562) 570-6543 / Jerry_Wada@longbeach.gov

DESCRIPTION: **Organization:** Municipal Government with approx. 6,000 employees servicing more than 500,000 residents

The City of Long Beach had been using multiple legacy imaging systems for many years when budget cuts, coinciding with technology requests, brought City and Police Department IT together to search for a more robust and economical solution. Over the period of about one year, Laserfiche was discovered to be the solution to their problem. After numerous discussions with IT and administrative staff at the City of Santa Monica, who had gone through a similar upgrade to Laserfiche, the City of Long Beach entered into an agreement with the Laserfiche Solutions Group to implement Laserfiche and convert data from three legacy applications.

By implementing Laserfiche, the City was able to reduce support costs while decreasing the amount of staff hours dedicated to its maintenance. Additional features and capabilities of the Laserfiche software have also allowed the City to expand its use and capabilities without increasing the costs normally associated with less flexible systems. For instance, the Long Beach Police Department is now using Laserfiche to host its Gang Injunction paperwork including access by patrol officers in the field.



Solution Overview

The State of Montana ITSD is looking for a scalable ECM solution which is deployable in a variety of different state agencies. Additionally, the State has identified that any selected vendor will have to be able to handle the nuances of deployment statewide, as well as facilitate a conversion of legacy applications to the new system. Helping customers transition through these types of deployments is an area of expertise for the Laserfiche Solutions Group. The following sections briefly discuss the Laserfiche Rio deployment scheme, as well as our general approach to converting legacy applications. A more detailed overview of our product suite can be referenced in the section titled “Software Modules.”

Laserfiche Rio ECM

The Laserfiche Rio RME ECM platform offers unrivaled bundled functionality and deployment flexibility to meet the clinical and business needs of the State of Montana ITSD. Laserfiche Rio is licensed purely by named user and bundles:

- Unlimited Laserfiche application servers & repositories optimized for Oracle and MS SQL to support Production, COOP, DR, Test, DEV, and Training environments
- Records management functionality that is DoD 5015.2 certified as a stand-alone platform as well as jointly with Microsoft SharePoint 2010
- Laserfiche Advanced Audit Trail for comprehensive managerial and compliance oversight
- Laserfiche Workflow Suite for powerful business process management capabilities
- Laserfiche Web Access full-featured Web-based client interface
- Laserfiche & Microsoft SharePoint Integration
- Laserfiche Mobile client for iPhone and iPads
- Laserfiche Digital Signatures
- Laserfiche Forms
- Desktop and Web Administration Consoles

The Laserfiche Content Server provides document imaging, document management and records management capabilities baked into the core system architecture and is configured and managed through a single administration interface. The system has been certified as compliant with the DoD 5015.2 and VERS standards so State of Montana ITSD can be confident that it provides the records management, security, auditing and information integrity functionality necessary.

The Laserfiche Workflow system is built on the Windows Workflow Foundation, provides an intuitive graphical interface for defining business processes, bundles a comprehensive set of pre-configured activities and provides comprehensive search and reporting tools. Laserfiche Workflow is an extensible workflow platform providing an embedded script editor, supporting custom activities and bundling a SDK so workflows and activities can be triggered from other systems programmatically.

Data Conversion

Using the batch processing tool for newly created content, Quick Fields, Laserfiche is able to migrate data and images from existing legacy systems while maintaining and adding new metadata as necessary. In some rare cases, the legacy system stored the images and data in such a way that it is necessary to create a script using the Laserfiche SDK to convert the data. Laserfiche uses the following questionnaire to help facilitate the data conversion process:

What data needs to be migrated?

- How much data needs to be migrated? If images are stored in the database, then provide the database size; otherwise provide both the database size and the image volume size.
- If parts of the legacy database don't need to be migrated or there will be multiple phases to the migration, is there an easy way to segregate the data?

Can a demo of the legacy imaging system be provided? This demo should focus on overall functionality of the current system and how certain business processes map to those in Laserfiche. Special attention should be paid to the database and imaging migration questions as outlined below. Additionally, items that affect Laserfiche-specific functionality such as capture processes, search/browse, and existing integrations or workflow should be addressed as well.

Project Management

What is the required timeline for migrating these documents from the legacy system?

- Will there be a phased approach to the migration?
 - Can data as parts of these phases be readily identified?

What is the maximum allowed downtime for the production system while the migration is taking place?

IT

Will there be a separate infrastructure in place for performing test migrations as well as the production migration?

- Is there enough storage capacity to handle the migration? Realize that double the amount of storage space is typically needed.

Database Migration

What is the backend database that you are migrating from?

- Can the data be accessed at the database level (e.g., SQL Server Management Studio for SQL Server databases)?

- If the database is not a standard database (e.g., SQL, Oracle), are there ODBC drivers for the database that will allow for access?
- If neither of those options work:
 - Are there third party utilities that will allow for access to the database?
 - Can metadata be exported from the legacy system en masse in a CSV or similar format?

Have considerations been made into how data coming from the legacy imaging system will be mapped into a Laserfiche file plan?

- Does the metadata need to be massaged/scrubbed/cleaned in some fashion before being migrated into Laserfiche? (lookups into other databases, concatenating fields, changes to naming conventions or folder hierarchies)
- Is there a requirement for matching user names coming from the legacy system to user names in Laserfiche? Use case: Let's say you are migrating from a legacy system to Laserfiche for an insurance company that is storing imaged claims. In the legacy system, the claims are assigned to various claims examiners. Once the claims have been migrated to Laserfiche, you may want to assign those legacy claims to the same user in Laserfiche. How would you accomplish this?
- Does security from the legacy system need to be mapped into the Laserfiche file plan?

Image Migration

Are the images stored in the database or in the file system?

- If in the file system, is there an easy way to correlate metadata in the database to the actual images on the file system?
- If in the database, are they stored as BLOBs in the database and can they be easily converted to something like TIFF or PDF?

What format are the images stored in?

- If the images are TIFF, do they have any sort of proprietary TIFF header that may store additional information about the document (e.g., metadata, images properties, etc.)?
 - If TIFF, single or multi page?
- If the images are in a proprietary format, can they be exported en masse to a format like TIFF or PDF?
 - Is there a conversion utility for the proprietary images?
 - Can the application easily export documents and metadata in bulk?
 - What formats does it export the images and metadata in?

What media are the images stored on?

- Are they standard hard drives or something else (e.g., magneto-optical, CD, DVD, tape, old hard drive, etc.)?

- The primary issue here is that any sort of near line or offline media like magneto optical disks are slow and may affect the overall timeline of the migration.

If there are annotations on the documents, do they need to be migrated as well?

- What types of annotations need to be migrated?
- If the annotations are position-based, are there coordinates in the legacy database that determine where to place the annotations? Or is it acceptable to place these annotations in a fixed position on the image page?

Are there electronic documents that also need to be converted?

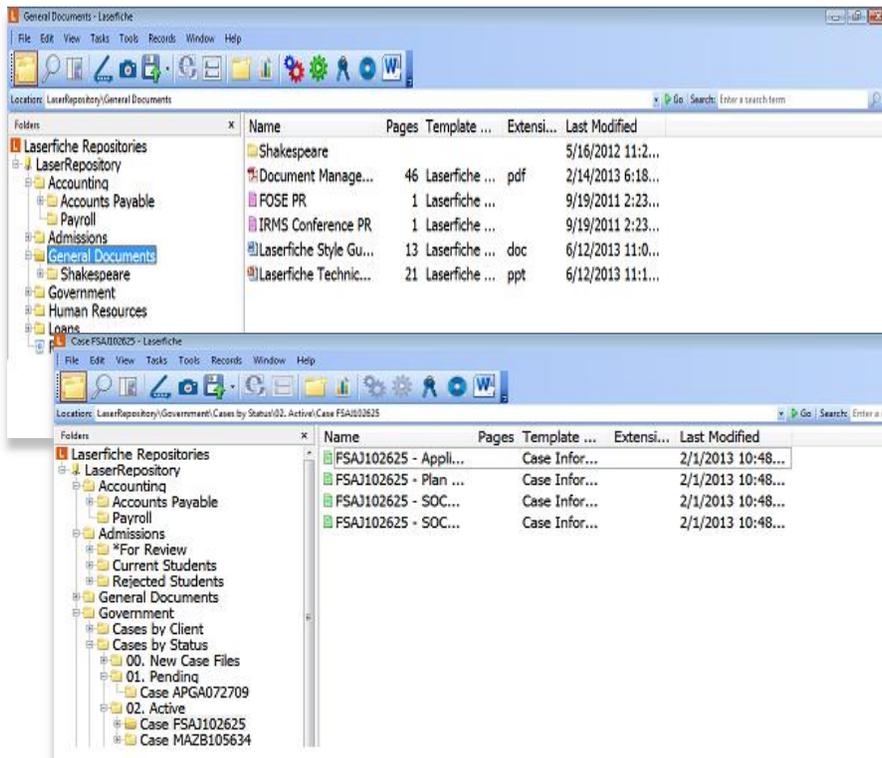
- What types of electronic documents?
- What kind(s) of processing needs to take place on these documents? (e.g., OCR, text extraction)

Can/Should these electronic documents be converted to the TIFF format as part of the conversion?

Software Modules

Laserfiche Client

The Laserfiche Client is the user-friendly software interface to our centralized electronic content repository which includes a variety of tools for managing content. Functionality of this fundamental Laserfiche product includes: document capture and image enhancement, storage and archiving for documents and unstructured information, easy-to-use document organization tools, annotation and



metadata features, search and retrieval, collaboration and content distribution, and extensive security controls. Through the client, Laserfiche users can access media saved in all formats including: files saved in the Office formats, text files, PDFs, Emails, Photos and Audio/video files.

Nested Folder Structure

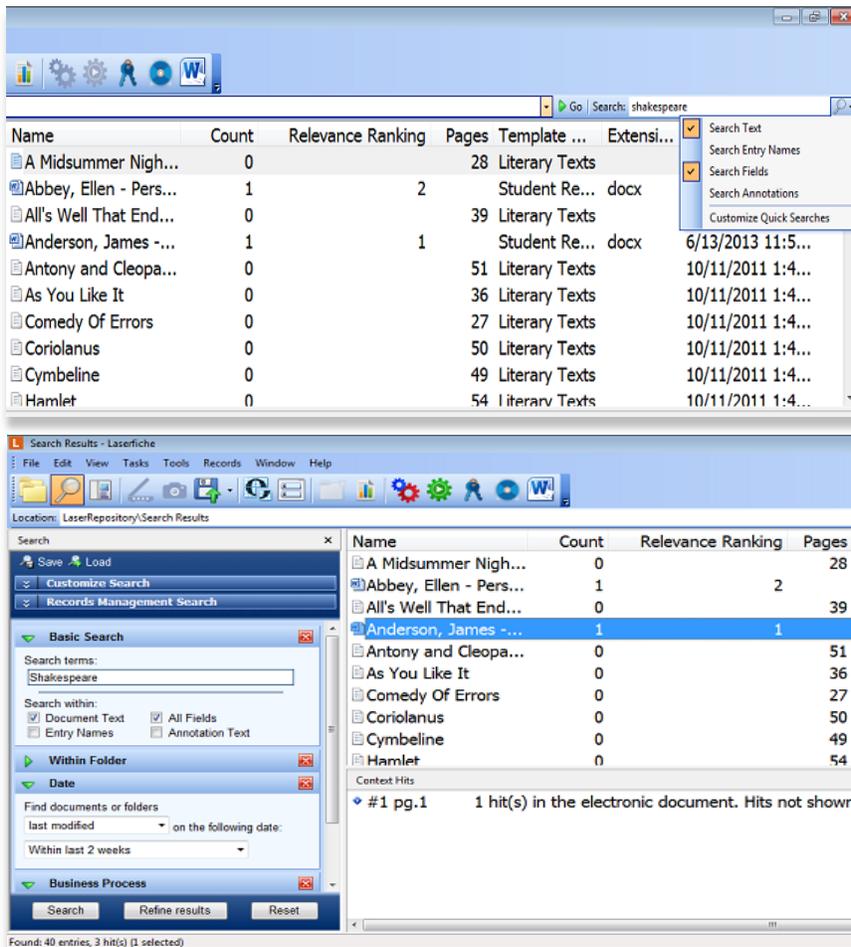
A fundamental facet of the repository interface is its intuitive, easy to navigate, nested folder structure. The Laserfiche folder structure is easy

to navigate for everyday and casual users. The nested folder structure, which enables users to click to expand and collapse folder contents, facilitates easy adoption and mastery for users of all levels of technical expertise. Our best practices for folder structure creation include intuitive folder naming conventions and fewer folder options at the repository's highest levels. Following these best practices further ensures that all users can easily and quickly get to the proper location in the client.



Search Tools

Another important set of features built into the Laserfiche Client are the powerful search tools which enable users to efficiently pinpoint content through the client interface.



Our quick search bar facilitates fast information lookup using keywords. Additionally, our advanced search pane allows users to search the repository using a wide range of criteria that will retrieve only the most useful entries. The Laserfiche search engine not only ranks results in order of

relevance, but also enables users to quickly refine searches to identify exactly what they need. Laserfiche has an intelligent search function, full-text, template field and other precision searches reduce time lost on hard copy file retrieval. Our search tools give all users the ability to search the contents of the repository for a specific word or phrase, search for

documents or folders based on their properties, user-defined metadata or text, and perform basic and advanced searches through simple user interfaces or with user-provided syntax.

Scanning Interfaces

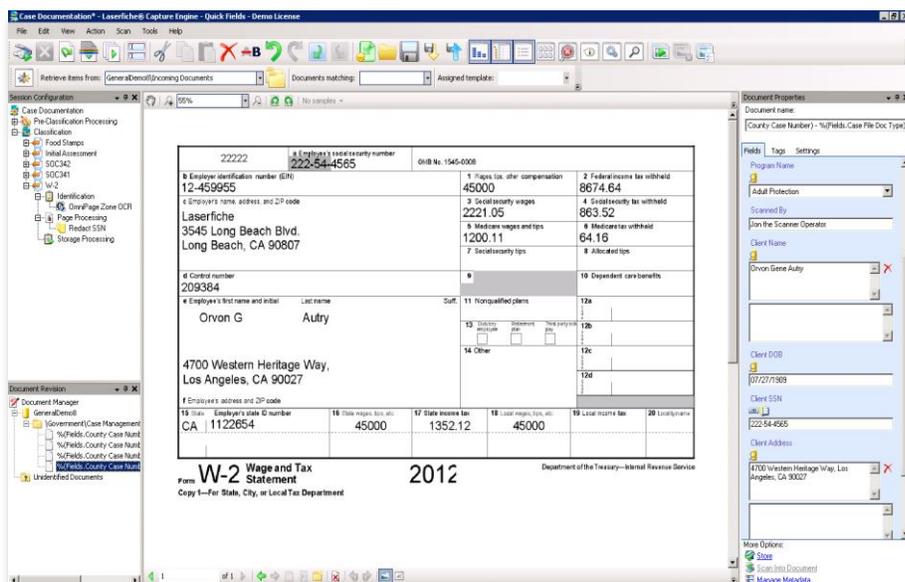
Because Laserfiche scanning is bundled with the proposed solution, any system user may be allowed to scan content into the repository. First, Laserfiche scanning includes a 'Basic Scanning' interface for low volume, ad-hoc scanning and a 'Standard Scanning' interface that includes more advanced image processing tools and batch processing functionality. Laserfiche Scanning supports most commercially available scanners through TWAIN, ISIS, Kofax and WIA drivers. Laserfiche Scanning can also 'scan' documents from local or network directories so images created through non-traditional capture devices (such as digital cameras) can be handled as if they are being scanned directly into the system. Laserfiche Scanning provides a wide range of image processing tools to provide the best possible image quality and includes OCR functionality so documents can be full-text searchable as soon as they're captured. Image clean up and OCR processing can also be done through centralized processing so there is a great deal of flexibility when defining the overall capture process.

Quick Fields

Our next scanning tool, Quick Fields, serves as the Laserfiche product suite's enterprise level document capture and batch processing platform. Users have the power to configure Quick Fields to identify different types of documents and process each type according to predefined business rules. Quick Fields can automate document indexing, filing and classification through a variety of data extraction tools such as barcode recognition, zonal Optical Character Recognition (OCR), Optical Mark Recognition (OMR) and database lookup. Quick Fields also automates repetitive processing tasks normally assigned to users during the quality control or review steps of the business process.

Quick Fields can be configured to automatically recognize specific types of information – such as social security numbers – and apply Laserfiche redactions at scan time so sensitive information is only available to users with the proper security profile. In addition to supporting most commercially available

scanners, Quick Fields enables users to 'scan' documents from Laserfiche based on predefined business rules. This capability provides a unique level of functionality when designing the overall capture workflow. This strategy distributes capture, centralizes



processing and automates the naming, indexing, filing and classification of documents regardless of how they are captured. This unique capability allows organizations to capture content immediately and integrate document processing into the overall business process so documents are immediately available in a secure fashion and all interaction is audited by Laserfiche. More importantly, this strategy requires minimal input from scanner operators. Quick Fields automates the most tedious components of document capture, routing exceptions to the most qualified users and providing a complete picture of a document's lifecycle.



Laserfiche Forms

Laserfiche Forms provides a simple, web-based tool for designing and publishing online forms. We like to think of forms as one of our most advanced capture tools because of its ability to capture content at the moment of creation without having to commit critical information to a piece of content that needs

to be processed further. Because Laserfiche Forms are tightly integrated with the Laserfiche

Workflow system, form submission can be used to initiate or continue workflow processes. The forms design tool includes

a simple workflow designer that allows the inclusion of approval and routing logic and can use Laserfiche Workflow rules.

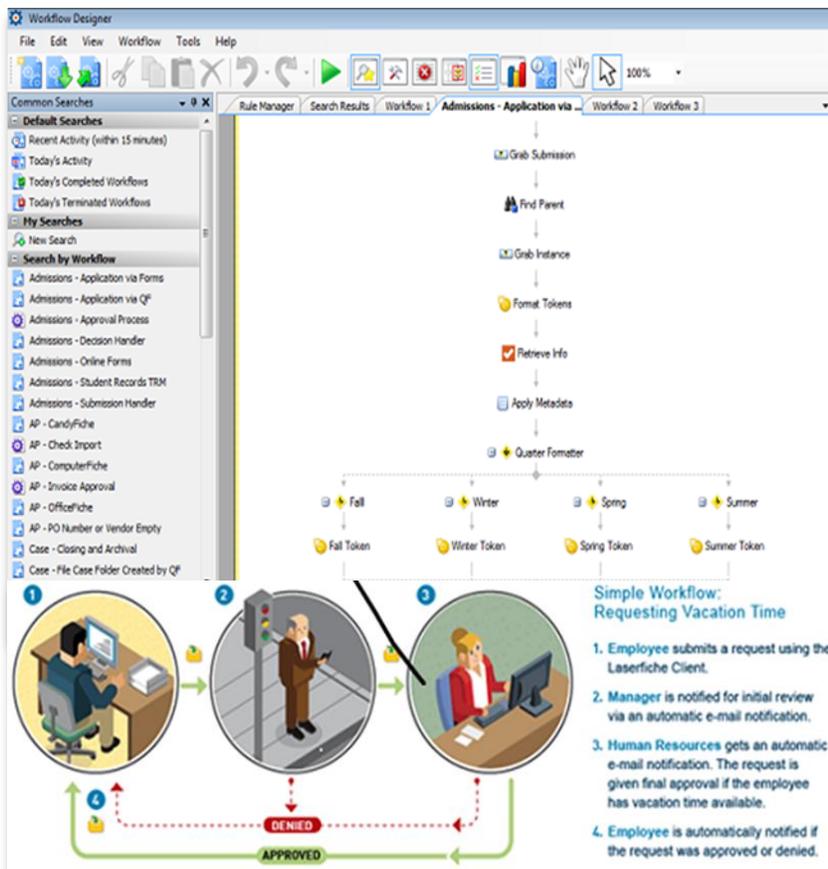
This design strategy will allow a large community of the States users to create forms. Laserfiche Forms provide a simple and intuitive interface for

inputting data. That information is made available to the Laserfiche Workflow System and can be used to collect additional information from other systems and automatically complete one or multiple PDF forms. Thus, if a client or case worker completed a simple web form, the system could use the information provided to fill out a complete document library and initiate the review and approval process.

Laserfiche Workflow

The Laserfiche Workflow system is a flexible, easy to use tool for automating and optimizing business processes across the organization. The Workflow Designer uses an intuitive graphical interface that lays out workflow activities in a logical, top-down flow and provides intuitive prompts for configuring each activity. For the power user, workflow provides the ability to map, model and manage business processes to achieve organization-critical goals. The system includes a large number of preconfigured activities for automating processes and customizing the way the system reacts to user activity. It also includes an embedded script editor and supports custom activities developed using the workflow extensions provided in Visual Studio .NET so it's highly extensible. Workflow is the essential tool for any enterprise looking to automate and enhance business processes. It gives power users the ability to define exactly which events, documents, and users will start a workflow, using flexible conditions. Workflow allows the enterprise to configure processes that will can: route documents based on pre-defined conditions, perform multiple process critical activities simultaneously, wait until predefined conditions are satisfied by users, and automatically retrieve and use data to customize formatting and routing decisions. Additionally, our PDF activities allow you to retrieve values from a PDF form and store

those values as tokens, assign values to a PDF form's fields and verify PDF signatures.



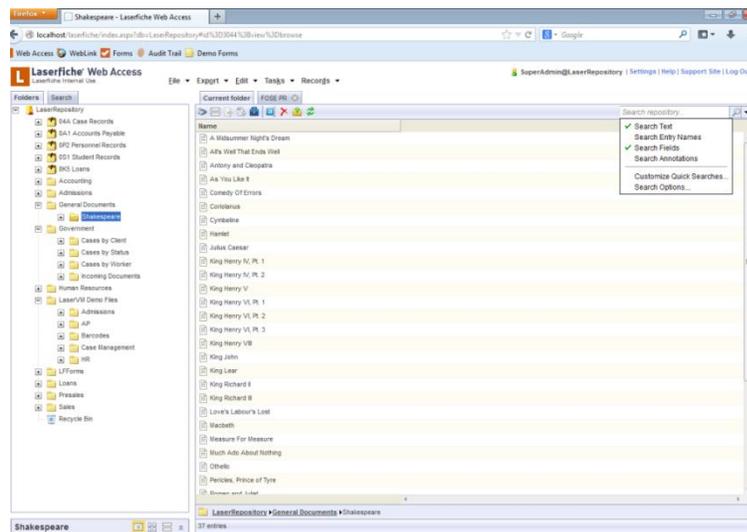
Everyday users benefit from workflow as well, because it facilitates organization-wide collaboration in business critical processes, all while maintaining a logical and pre-determined order of events. Employees no longer have the worries of where documents are or who needs to complete processes because workflow can be used to facilitate, track and assist in completing almost all mission-critical processes. Workflow can also assist in creating a standardized folder structure by automatically creating folders for new documents and applying standard naming

conventions to new documents and folders. Finally, management and administrators have the ability to search and run reports on workflows in progress to determine production metrics and identify processing bottlenecks.

Laserfiche Web Access

Laserfiche Web Access is the web version of the Laserfiche client which delivers enterprise-wide content management capabilities in a single installation. By delivering all the functionality of the desktop Laserfiche interface, Laserfiche Web Access allows for consolidated management of resources and data, as well as remote or portable access. Laserfiche Web Access offers a number of features to help you

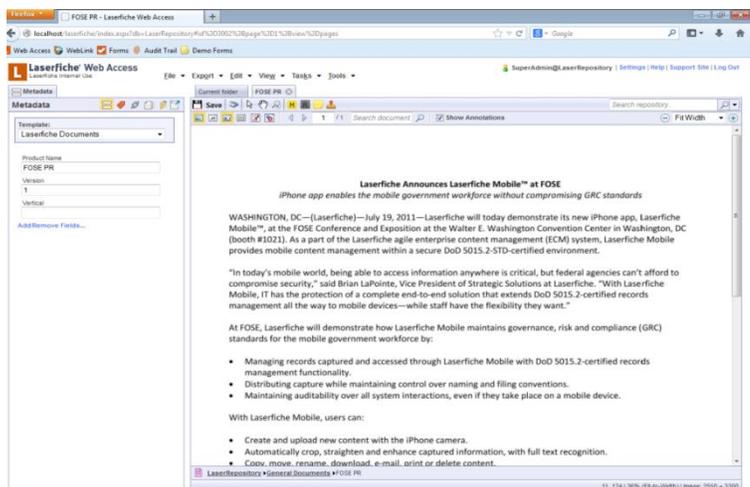
work with documents more easily: With Laserfiche Web Access, staff can search, retrieve and work on documents from the Laserfiche repository through their Web browser, whether they're using the corporate intranet, logging in from a branch office or connecting from a laptop while in the field.



By extending document management capabilities to your entire organization with one installation, Laserfiche Web Access helps you conserve time and

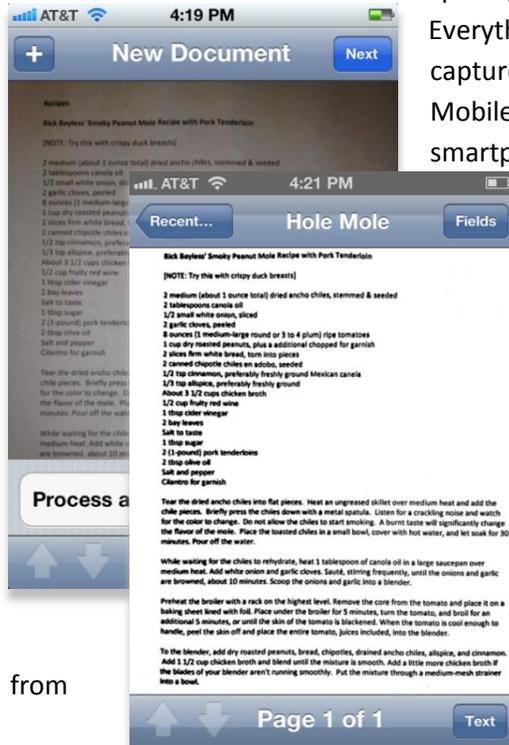
labor resources, immediately gain efficiency and cost-effectively increase productivity. Because it integrates easily with your existing infrastructure, it capitalizes on your technology investment by increasing your network's business value. In addition to reducing the costs of paper-based processes, Laserfiche Web Access lowers your Laserfiche system's administration requirements, so IT staff can accomplish more in less time while expending fewer resources.

Laserfiche Web Access immediately extends better decision making, lower overhead costs and increased efficiency throughout your organization, all while relieving your IT department of installation, maintenance and troubleshooting burdens.



Laserfiche Mobile

Our mobile platform provides the ability to extend collaborating, viewing, approving, and capture capabilities to the field. The mobile client combines the advanced image processing functionality of Laserfiche Photo Docs with a web based version of our desktop client. With these tools, users can view, upload, and modify content on the go or from the comfort of home.

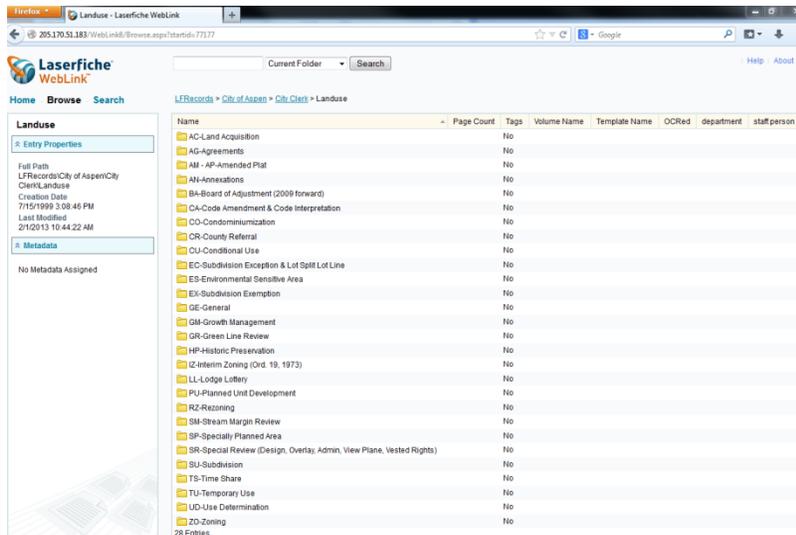


from

Everything from workflow approvals to document creation and capture can be facilitated through our mobile client. Laserfiche Mobile comes with the system, can be accessed from any smartphone or tablet and is also available for free download from either the Android or Apple App Store. The application uses the phone's camera as a portable scanner. Images captured through the iPhone, iPad, Tablet or Android Device are not stored locally (for security purposes), and are uploaded through Laserfiche Web Access for processing. The Laserfiche Photo Docs technology de-warps the images, automatically crops the page and OCRs the documents so they're immediately available for full text searching. Laserfiche Mobile also provides the ability to index documents as they are captured or at a later time; the mobile platform allows users to search, retrieve and view documents, as well as participate in business processes anywhere at any time.

Public Portal

Laserfiche Web Link is a read-only portal used to provide access of internal documents to specific users and user groups allowing to view the documentation which they need. Archived documentation can be published to an internal user group which can then be viewed and printed if need be. Web Link was designed to be easily configurable, searchable and secure. With Web Link all departments under the State of Montana can customize the web link page to mimic its current web image. An advantage of this is the consistency of look and feel for the end user while keeping to the institutions specific design

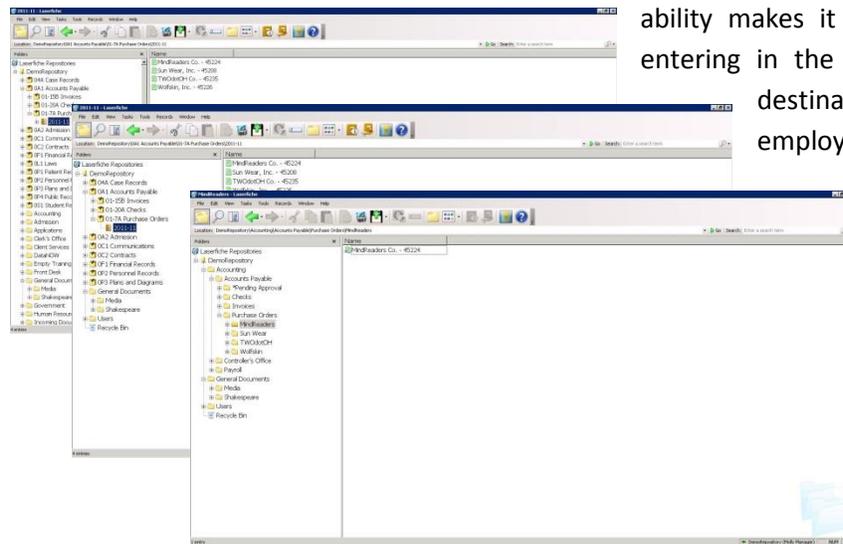


vision. Multiple Web Links can be set up for different departments and repositories which mitigates the risk of non-intended users accessing confidential data. Web Link is designed to accommodate any browser and gives the user the option to view the data needed without any extra plug-ins. This functionality is a great tool for the State of Montana to publish read only content to comply with public records requests.

Transparent Records Management

A Laserfiche software solution will provide the State of Montana with the tools to deploy a rules-based records management file plan that administers document lifecycles transparently. Transparent Records Management is attained through a combination of auto-classification of documents and role-specific content views that can be implemented for nearly any business unit.

Using Laserfiche Workflow, content imported into a repository is automatically classified and filed away in an appropriate record series, with cutoff rules and retention schedules applied dynamically. This



ability makes it easy to trust that any content entering in the system is going to the correct destination without having to rely on employees and risk human error. The organization of documents is handled efficiently and accurately over the course of their lifecycles, thereby removing tedious and often time-consuming administrative tasks while ensuring that data is easy to find.

Additionally, custom content views can be easily built out for employees involved in different aspects of a business process. Laserfiche's highly flexible implementations allow information to be organized visually based on someone's position within the organization, role within a process, or by a business process itself. These multiple views provide valuable insight in any business scenario, from helping users in the fish, wildlife and parks department to the state attorney's office. The power of information is amplified significantly when it is leveraged with relevant context, and these role-specific views bring all of the applicable information for a given employee to the forefront where it is presented intuitively. Such displays deliver the ability to analyze pertinent information from multiple perspectives, and ultimately provide better service as a result of having information in varied contexts.

Records Management is an important part of any organization, especially for State Governments, which have a duty to maintain records as part of their mission to serve their citizens. Laserfiche therefore believes that records management should not be a burden, and it should not add overhead- it should be intuitive. A flawless records management system exists as a convenient outcome of using Laserfiche for business process management.

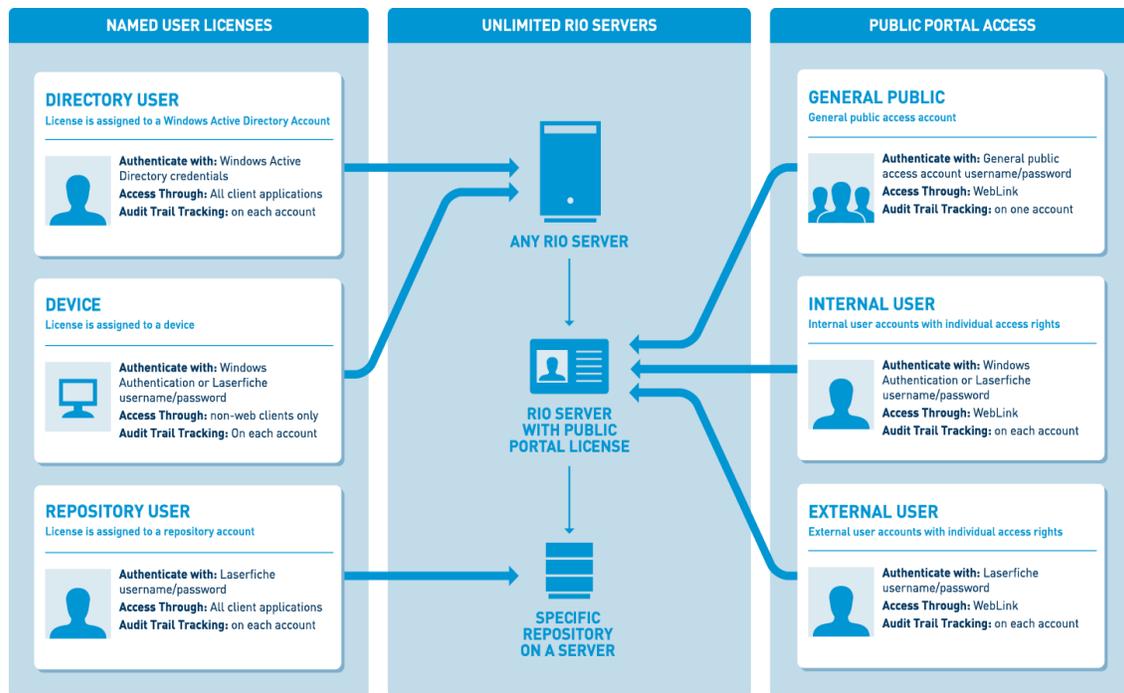


Licensing Options

Laserfiche employs a named user licensing methodology- this model offers flexibility to cater to the needs of diverse user populations. The vast majority of our customers assign their named user licenses to Directory Users (Active Directory or LDAP) to allow the most flexibility for users to access the Laserfiche system from any device or client application. Only a single named user license need be allocated to a directory user in order to allow access to any Laserfiche Server from any device. For groups of users that may share workstations based on shifts, a named user license can be assigned to a device to provide authenticated access to the Laserfiche system without having to purchase a license for each of these users.

Within the Laserfiche Administration Console, administrators can track the total number of named user licenses available and specifically which environments that user has been granted access.

The following graphic provides detail in the types of license assignment and how users can authenticate to the system.



Estimated Costs

Software Licensing Acquisition Costs

Product	Description	Qty	Price	Total
Laserfiche User Licenses				
ENF02	Lf Rio RME Full Users with Forms, Workflow, Web Access and Mobile	5,000	\$240.00	\$1,200,000.00
Optional Capture Components				
QFA	Quick Fields Agent	1	\$10,000.00	\$10,000.00
QCX	Quick Fields Complete	1	\$15,000.00	\$15,000.00
IA	Laserfiche Import Agent	1	\$1,500.00	\$1,500.00
EPFRM	Laserfiche Forms Portal	1	\$7,995.00	\$7,995.00
Optional Additional Components				
TK	Laserfiche SDK	1	\$2,500.00	\$2,500.00
PPX2	Laserfiche Public Portal (dual CPU machine)	1	\$50,000.00	\$50,000.00
Software Total				\$1,287,000.00

Laserfiche Software Assurance Plan (LSAP)				
ENF02B	Lf Rio Full User LSAP	5,000	\$48.00	\$240,000.00
QFAB	Quick Fields Agent LSAP	1	\$2,000.00	\$2,000.00
QCXB	Quick Fields Complete LSAP	1	\$3,000.00	\$3,000.00
IAB	Laserfiche Import Agent LSAP	1	\$300.00	\$300.00
EPRFMB	Laserfiche Forms Portal LSAP	1	\$1600.00	\$1600.00
TKB	Laserfiche SDK LSAP	1	\$500.00	\$500.00
PPX2B	Laserfiche Public Portal LSAP	1	\$10,000.00	\$10,000.00
LSAP Total				\$257,400.00

Software Total	\$1,287,000.00
LSAP Total	\$257,400.00
Total	\$1,544,400.00

Annual Laserfiche Software Assurance Plan Licensing Maintenance

Product	Description	Qty	Price	Total
LSAP	Laserfiche Rio LSAP	1	\$257,400.00	\$257,400.00
Total Annual Renewal Cost				\$257,400.00

*LF RME is a 10% add on to all full name and retrieval users (added into price above)

*LF Forms is a 10% add on to all full name users (added into price above)

Laserfiche Rio Volume Discount Pricing Tiers

Laserfiche seeks to provide its customers the most feature rich and economical enterprise content management solutions in the industry. As systems continue to grow in named user count, the cost per user decreases at the pricing tiers detailed below. The discount tiers are specific to named user license type and cannot be combined. The pricing tier available to customers is determined by the total size of the system inclusive of the pending license purchase.

Product	Description	Price/User	LSAP/User
<i>Laserfiche Rio Named Full User Volume Discount Pricing Tiers</i>			
ENF02	200 Named Full User System	\$600.00	\$120.00
ENF05	500 Named Full User System	\$500.00	\$100.00
ENF10	1,000 Named Full User System	\$400.00	\$80.00
ENF15	1,500 Named Full User System	\$350.00	\$70.00
ENF20	2,000 Named Full User System	\$300.00	\$60.00
ENF30	3,000 Named Full User System	\$260.00	\$52.00
ENF40	4,000 Named Full User System	\$230.00	\$46.00
ENF50	5,000 Named Full User System	\$200.00	\$40.00
ENF60	6,000 Named Full User System	\$190.00	\$38.00
ENF70	7,000 Named Full User System	\$180.00	\$36.00
<i>Laserfiche Rio Named Retrieval User Volume Discount Pricing Tiers</i>			
ENR2	200 Named Retrieval User System	\$200.00	\$40.00
ENR10	1,000 Named Retrieval User System	\$100.00	\$20.00
ENR100	10,000 Named Retrieval User System	\$38.00	\$8.00

Professional Services and Training

The Laserfiche Strategic Solutions Group (LSSG) is the implementation arm of Laserfiche operating globally to engage directly with strategic accounts. The highly trained and experienced engineering and consulting staff of LSSG is available to develop and deliver a Laserfiche solution configured to meet your needs. To deploy our services we use an agile project management methodology which provides a predictable, reliable, deployment strategy to ensure a timely and successful implementation of our system. Prior to deployment our engineers will sit down to understand detailed requirements of the project including the business processes and how they are currently structured, how employees interact with the documentation on a given day as well as understand the overall goals of the departments. Our engineers pride themselves on being able to take a process and re-engineer it so that tasks can be automated and streamlined for efficiency.

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

Laserfiche provides multi-level support and maintains procedural escalation paths to ensure our customers receive the assistance they require. 24-hour on-line support forums, email & telephone technical support, and on-site and remote dial-up services incorporate resources from engineering, quality assurance, and development staff. The Laserfiche Strategic Solutions Group has a team of technical engineers that will be focused on the design, implementation and roll out of this project. Within the scope of the implementation, technical support is built into the deployment process for any personnel needing assistance. Because we know that support is important, we will place a dedicated technical engineer to answer questions as needed who will also manage the knowledge transfer and product training development and documentation.

Professional Services and Training Rates

Product	Description	Price
<i>LSG Professional Services Daily Rates</i>		
Install	Installation of Laserfiche related software components	\$1,500.00
Training	Training for all Laserfiche products except SDK	\$1,500.00
Consult	Requirements analysis & solution design	\$1,500.00
PM	Project management	\$1,500.00
Program	Level I programming	\$2,000.00
	Level II programming	\$2,400.00
	Level III programming	\$3,000.00

Document Imaging Specifications		Out of the Box	Customization Required	3 rd Party Application	Comments
1.	Does the ECM provide imaging software to import basic scanned documents?	X			<p>Yes. Laserfiche Scanning is provided to users out-of-the-box, and allows for documents to be quickly scanned into Laserfiche from a user's physical scanner or from a network file location. Laserfiche Scanning allows users to index documents by applying metadata fields at the time of scanning, as well as provides for image processing capabilities such as the ability to clean up "noise" from document images, align pages scanned in at odd angles, and run OCR (Optical Character Recognition) to extract searchable text from the scanned pages.</p> <p>Additionally, Laserfiche offers Quick Fields as our advanced batch scanning and processing tool. Quick Fields is designed to handle large batches of documents being scanned in at once, including batches that contain multiple document types. Quick Fields can identify specific documents as they are scanned, automatically extract information from and index the document pages, and then automatically route the documents into the proper locations inside the Laserfiche Repository. Quick Fields is</p>



					also loaded with powerful image processing tools that can improve the quality of the documents being scanned.
2.	Does the ECM support the following imaging capabilities:				
	Optical Character Recognition (OCR)	X			Yes. OCR can be run on documents at the time that they are scanned/imported into the Laserfiche Repository, or on documents that are already stored in the Laserfiche Repository.
	Intelligent Character Recognition (ICR)			X	Laserfiche achieves ICR functionality through integrations provided by our licensed Professional Development Partners.
	Optical Mark Recognition (OMR)	X			Yes. Laserfiche Quick Fields provides the ability to run OMR processes on scanned documents.
	Optical Bar Code Reader (OBR)	X			Yes. Laserfiche Quick Fields can read barcodes from scanned documents, extract the information contained in the barcode, and then use said information to both index the documents as well as to file the documents away into appropriate folder locations inside Laserfiche.
	Mobile Capture – smart phones and other mobile devices	X			Yes. Laserfiche Mobile is our application available for both iPhone and Android devices. Laserfiche Mobile allows users to capture and upload photos taken directly from

					their mobile devices. Photos taken from the mobile device can then be processed at the web server level using patented image processing technology from Laserfiche Photo Docs to correct the distortion, lighting and keystone issues common with photographs.
3.	Is the system compatible with Multi-functional Devices (MFDs) i.e. copiers, mobile device capture, fax server, email, and file import?	X			Yes. MFDs that support ISIS or Twain scanner drivers can scan directly into Laserfiche. If an MFD does not support ISIS or Twain drivers, it can scan to a network location and Laserfiche can then import/scan the documents from that location.
4.	Does the system have the capability to do batch scanning and indexing?	X			Yes. As mentioned in Document Imaging Specification 1 above, Laserfiche offers Quick Fields as our advanced batch scanning and processing tool. Quick Fields is designed to handle large batches of documents being scanned in at once, including batches that contain multiple document types. Quick Fields can identify specific documents as they are scanned, automatically extract information from and index the document pages, and then automatically route the documents into the proper locations inside the Laserfiche Repository. Quick Fields is also loaded with powerful image processing tools that can improve the quality of the documents being scanned. Quick Fields Agent adds the



					ability to scan/import batches of documents on a scheduled basis, to allow for overnight or downtime processing.
5.	Does the system provide the ability to capture index information from scanning/capture software?	X			<p>Yes. Laserfiche Scanning, our out-of-the-box scanning tool, allows users to index documents by applying metadata fields at the time of scanning. Scanned images and their associated metadata are then stored together into the Laserfiche repository.</p> <p>Laserfiche Quick Fields, our batch scanning and processing tool, offers the additional functionality of being able to automatically extract information from and index document images using an advanced suite of tools, such as Zonal OCR and barcode recognition. Quick Fields can then use the extracted information to automatically route and store the documents into the proper locations inside the Laserfiche Repository.</p>



Content Management Specifications		Out of the Box	Customization Required	3 rd Party Application	Comments
1.	What kind of navigational capabilities does your solution support:				
	<ul style="list-style-type: none"> • Folders (similar to MS Windows Explorer) 	X			Laserfiche stores documents within a customizable folder structure that is modeled on the standard Windows Explorer folder environment. This creates a folder structure that is immediately familiar to users and is simple and easy to edit and manage.
	<ul style="list-style-type: none"> • Key word search 	X			All documents that come into Laserfiche can have metadata fields applied that can contain any desired information relevant to the documents. Users can then run searches (granted they have the appropriate security privileges) using words or phrases, and any documents with metadata that matches the searched key words and/or phrases will be returned. Additionally, users can run text searches on documents that have been OCR'd, allowing for key word searches within the body of a document's text.
	<ul style="list-style-type: none"> • Formal taxonomy using document types and classes 	X			Metadata fields and templates (which are simply collections of metadata fields) can be created within Laserfiche to designate any desired document as a particular class or type. Document classes/types can then be stored in custom folder structures in order to group related classes/types,



					and Laserfiche Workflow can be leveraged to automatically store, route, and manage documents based on their assigned class/type.
	<ul style="list-style-type: none"> All of the above 	X			Laserfiche supports all of the above mentioned navigational capabilities from one common interface, the Laserfiche software or web client. Users can navigate using the method that is most comfortable or efficient to them and/or can combine any or all methods to find the documents they need.
2.	Does your solution support remote access to the ECM system, i.e. for staff that work in the field and have the need to enter documents from the field?	X			<p>Yes, Laserfiche supports a variety of methods to enable remote access to the Laserfiche system. Laserfiche Web Access is our web-based client and allows users full access to the Laserfiche repository through their web browser, including the ability to view and edit documents, search for documents, upload and scan documents, apply metadata, etc.</p> <p>Laserfiche also provides Laserfiche Mobile, a mobile application available for both iOS and Android devices. Laserfiche Mobile allows for users to access Laserfiche through their mobile device, and perform a variety of actions within the repository including browsing, searching, applying metadata, interacting with workflows,</p>

					uploading documents, etc.
3.	Does your solution provide access to documents on a public-facing online system?	X			Yes. Laserfiche WebLink is a user-friendly public portal site for providing Internet access to publicly available documents. It can be easily configured to display a custom visual style, such as one that matches your existing Website, and to show searches and links that quickly guide users to what they are looking for.
4.	Does the ECM support multiple naming and archiving processes?	X			Yes. Laserfiche is designed to allow for multiple naming/organizational structures and processes to exist at one time within the Laserfiche system. Not only can various structures be present, but Laserfiche Workflow can be used to automatically manage and maintain the naming and archiving processes that documents proceed



					through while stored in the Laserfiche repository.
5.	Does the ECM fully integrate with Microsoft Office applications (Word, Excel, PowerPoint, etc.)?	X			Laserfiche has an out of the box Microsoft Office integration that allows sending documents to Laserfiche from any Microsoft Office product, as well as allowing users to view and edit Laserfiche metadata directly from the Office product. All Office document types (along with all other electronic document types) open in their native file application when opened within Laserfiche.
6.	Does the ECM fully integrate with Microsoft Exchange?	X			Laserfiche fully supports sending emails through Exchange email accounts. Users with MAPI-compliant email clients can send emails from Laserfiche by simply right-clicking on a document, and Laserfiche Workflow can be configured to automatically send email notifications using an Exchange server. Additionally, Workflow supports automatically creating and updating Exchange tasks, appointments, and contacts.
7.	Does your solution support email archiving and management capabilities?	X			Yes. Emails can be stored in Laserfiche and will be opened using whatever native email application is installed on a user's computer. Users with Microsoft Outlook can drag-and-drop emails directly from Outlook into Laserfiche, and metadata such as sender, recipient, subject, etc. can automatically be applied to the email



					stored in Laserfiche. If automated email archiving is desired, a number of Laserfiche Professional Developer Partners provide integrations that allow for automatic email storage classification.
8.	Does the ECM allow access to documents by an Apple iOS or Android device?	X			Yes. Laserfiche provides Laserfiche Mobile, a mobile application available for both iOS and Android devices. Laserfiche Mobile allows for users to access Laserfiche through their mobile device, and perform a variety of actions within the repository including browsing, searching, applying metadata, interacting with workflows, uploading documents, etc.
9.	Does the ECM allow access to documents via web browser? If so, list the compatible browsers and versions in the Comments section.	X			Yes. Laserfiche Web Access is our web-based client and allows users full access to the Laserfiche repository through their web browser, including the ability to view and edit documents, search for documents, upload and scan documents, apply metadata, etc. Laserfiche Web Access supports Internet Explorer (version 7 through 11), Firefox (version 4+), Chrome (version 6+), and Safari (version 4+), on both Windows and Mac OS.
10.	How does the solution manage documents with a retention policy?	X			Laserfiche Records Management Edition provides integrated, DoD 5015.2 certified records management functionality, providing for the management of records in Laserfiche

					throughout the complete records lifecycle: from creation, through retention, to disposition. Records stored in Laserfiche are organized into a records specific folder structure, and lifecycle rules (such as retention policies) are set on this folder level. When a document is put into a record folder, it will automatically be declared a record and will inherit the folder's retention policies. When a record reaches the end of its retention, records managers can be notified and can easily put the record through final disposition (i.e. secure destruction).
11.	Provide examples of reports that can be used to ensure retention policies are being adhered to.	X			Laserfiche Records Management Edition provides records managers the ability to configure and run any number of custom reports, including reports detailing current retention policies. For example, a records manager could easily run a report on a desired set of records and display the retention cycle(s) being followed.
12.	Search Capabilities				
	<ul style="list-style-type: none"> Will the system accommodate full text OCR to search for and retrieve files? 	X			Yes, Laserfiche supports full text searching within documents that have been OCR'd. If a user's search terms match text contained in a document, the document will not only be returned as a search result, but will also display the relevant search term in a contextual menu that allows users

					to see specifically where a text search term occurs inside a document.
	<ul style="list-style-type: none"> Does the ECM offer web-based and desktop client interface search and retrieval? 	X			Yes. The Laserfiche Search interface, available through both the Laserfiche software and web clients, is built to allow users to quickly define searches as well as combine multiple different searches together. From the Laserfiche Search Pane, users can select to search by folder location, document/folder name, metadata template, metadata value, document text or creation date, just to name a few options. Any of these selectable searches can be combined with any other search to only return documents/folders that meet all the criteria. In addition, Laserfiche Advanced Search Syntax can be used to create custom searches that augment the out-of-the-box searches that are provided.
	<ul style="list-style-type: none"> Does the ECM accommodate "Full Text Indexing" (i.e. OCR) to search for and retrieve files? 	X			As stated previously, Laserfiche supports full text searching within documents that have been OCR'd. If a user's search terms match text contained in a document, the document will not only be returned as a search result, but will also display the relevant search term in a contextual menu that allows users to see specifically where a text search term occurs inside a document.



	<ul style="list-style-type: none"> Does the ECM allow users to configure custom searches that they commonly use? 	<p style="text-align: center;">X</p>			<p>Yes. Laserfiche users can easily save any configured search and retrieve the saved search at any time. Saved searches can also be pushed out to other users by an Administrative user, allowing default searches to be quickly created and shared amongst multiple users.</p>
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Automated Workflow Specifications		Out of the Box	Customization Required	3 rd Party Application	Comments
1.	Does your ECMS support document-centric, author-review-approve automated workflow capabilities?	X			Yes. Laserfiche Workflow is a powerful workflow and business process automation tool, and allows for the intuitive configuration of nearly any approval process that would be required. Workflow is configured using an easy to learn, drag-and-drop, graphical user interface, which allows for the efficient translation and creation of business processes inside Laserfiche Workflow. Workflow contains over 80 prebuilt activities, including the ability to route documents to specific users or groups, automatically send notification emails to users, and require users to take specific actions to move a workflow to the next step. All of these capabilities and more are available to ensure that your specific process can be managed inside Laserfiche.
2.	Does your ECMS support workflow automation for processing:				
	<ul style="list-style-type: none"> E-forms for internal purposes 	X			Yes. Laserfiche Forms, our internally developed e-forms tool, provides the ability to dynamically route submitted forms to users for approval, review, etc. Information submitted via Laserfiche Forms can also be sent to Laserfiche Workflow and included in any workflows occurring in the Laserfiche Repository.

	<ul style="list-style-type: none"> E-forms for external customer purposes 	X			Yes. The Laserfiche Forms Portal allows for external users to submit forms to Laserfiche. Forms submitted by external users can then be routed in the same manner as forms submitted by internal users, as explained above.
	<ul style="list-style-type: none"> Work items (documents, reports, etc.) 	X			Yes. Laserfiche Workflow can easily and automatically route work item documents and/or folders to specific users, and can arrange them in logical work queues so that users are presented with the work that they need to focus on. Once a work item is acted upon, Workflow can automatically move the item on to the next required step(s) in the process, whether that be further processing, approval, archival, etc.
	<ul style="list-style-type: none"> Automatic notifications and emails 	X			Yes. Laserfiche Workflow can easily be configured to automatically send notification emails to any users or groups involved in a workflow process. Emails can contain dynamic information that has been gathered or used during the workflow and can include copies of or links to specific documents stored within Laserfiche.
	<ul style="list-style-type: none"> Workflow status tracking 	X			Yes. Laserfiche Workflow Business Processes make it easy to see exactly what step a process is currently at and a timeline of what steps have already occurred, directly from the Laserfiche Client. Business Processes can also

					display step-specific instructions to users, so that users are informed of what actions need to be taken at particular points in the process.
3.	Does the system allow users to perform workflow activities using a standard web browser such as Internet Explorer and Mozilla Firefox?	X			Yes. Laserfiche users are able to start workflows and fully participate in workflow processes from Laserfiche Web Access, our browser-based client.
4.	Does workflow allow users to define conditions?	X			Yes. Laserfiche Workflow allows administrative users to define conditions using the Workflow Designer tool, an intuitive, drag-and-drop, graphical interface for building workflows in Laserfiche. Conditions can be defined for many different situations/decisions during a workflow process, including when or why a workflow begins and what actions are taken at any point during a workflow.
5.	Can workflow be automated for a specific document type and workflow template?	X			Yes. Laserfiche Workflow includes the ability to easily build workflows to specifically process individual document types.
6.	Does the workflow include E-signature capabilities?	X			Yes. Laserfiche Workflow has the ability to apply certificate-backed Digital Signatures to documents stored in Laserfiche, as well as verify Digital Signatures placed on the documents by other users. In general, Laserfiche Digital Signatures provide indication that a document is authentic, has been signed by a particular person, and has not been changed/modified since the signature was applied.

Records Management Specification		Out of the Box	Customization Required	3 rd Party Application	Comments
1.	Include the use of back end migration to optical storage or similar technology that meets the State of Montana legislative compliance requirement for permanent records storage of documents. There should be assurance that records stored in the system cannot be altered.	X			Laserfiche Records Management Edition supports exporting records for archival storage at the end of their retention period and/or backing up records to external storage media. Laserfiche does not put any restrictions on what physical storage media is used for records or backups, but the actual file transfer to archive media such as optical disks will be accomplished separately from the Laserfiche system.
2.	Create, edit and manage a corporate “file plan” / records retention schedule, which contains information used to classify records.	X			Yes. All records lifecycle policies, including retention schedules, disposition policies, transfer locations, etc. are configured and managed centrally in the Laserfiche Administration Console.
3.	Create and manage the record folders (and folder volumes) that are available to help organize the file plan.	X			Yes. Administrative users/records managers have the ability to create and manage the records management folder structure in Laserfiche. Records organizational structure is completely customizable, and can be built to meet the needs of any given set of records.
4.	Configure the system to easily declare objects as records in native authoring tools and specify which object classes and properties to manage.	X			Yes. Laserfiche Records Management Edition allows for easy classification and declaration of records. Records retention policies are assigned on the record folder level, and when a record or group of records is moved into the



					appropriate records folder, it will automatically be declared a record and will inherit the lifecycle policies from the folder.
5.	Create and manage records retention rules.	X			Yes. Retention rules can be centrally created and managed in the Laserfiche Administration Console.
6.	Create and manage physical boxes, folders and records.			X	Laserfiche partners with Infolinx to provide for the management of physical records throughout their entire lifecycle, from creation to final disposition. The integration with Infolinx provides a host of features for physical records, including barcode and RFID support, full search capabilities, transfers, audit trail, reporting, etc.
7.	Search for categories, folders and records.	X			Yes. Laserfiche Search provides the ability to run a large variety of different search criteria to find stored records, including the ability to search by category, folder location, record type, record name, retention policy, disposition policy, etc.
8.	Place holds against record categories or search results.	X			Yes. Laserfiche supports placing holds, termed "Freezes", against any record or group of records stored in the repository. Records under a hold cannot have any records management actions performed on them until the hold is lifted. Records holds (as with all other records management actions) can be applied against records

					returned via search results.
9.	Identify appropriate metadata for all formats and sources.	X			Yes. All records stored in Laserfiche can have metadata templates and fields applied as needed. Metadata can be configured so that each type of record has a unique metadata template applied, with metadata fields that reflect whatever specific properties are relevant to the record, such as format or source.
10.	Manage various record image / formats in an integrated manner.	X			Yes. All document/image formats stored in the Laserfiche repository can be managed as records. Records policies and records management actions are applied and managed in the same way for all records, regardless of document format.
11.	Maintain the relationships between records and files, between file series and the file plan.	X			Yes. The configurable records folder structure in Laserfiche allows for an organizational and relationship structure that best fits your records and processes. Records folders can be created, named, and arranged to reflect your desired structure, and records can then be placed into the structure as necessary. Records lifecycle policies are applied at and inherited from the folder level, tying together the folder structure with the records rules that it represents.
12.	Retrieve information for personal use or to comply with Freedom of Information Act / discovery requests.	X			Yes. Laserfiche Search allows users to search for and retrieve records according to nearly any property or

					piece of metadata associated with the record: record name, record type, retention policy, filing date, etc. This allows users to easily and powerfully find any records they are looking for, whether for personal use or discovery purposes.
13.	Construct and manage audit trails and track system usage by department and user.	X			Yes. Laserfiche Audit Trail provides for full auditing and reporting capabilities on actions taken within the Laserfiche repository, including records management actions. Reports can be created and customized to return whatever audit data is required, either in table or graph format.
14.	Manage the integrity and reliability of records once they have been declared as such.	X			Yes. Laserfiche Security is used to control access to records, and ensures that only appropriate users will have access to any given record. Additionally, when a record enters its retention period it is made read-only, so that records cannot be altered while being retained. Finally, the Laserfiche product suite is fully certified with the Victorian Electronic Record Strategy (VERS) requirements, a world-recognized standard for reliably and authentically preserving electronic records over long periods of time. VERS is endorsed by the State Government of Victoria, Australia, and is accepted and used as the backbone of e-Governance by archival institutions around the world.

15.	Identify records that are due for disposal when their prescribed retention periods elapse, managing the disposal process.	X			Yes. Laserfiche Search makes it simple to find all records that are eligible for disposition at a certain time. Records managers can then perform bulk disposition on all returned records. Laserfiche Workflow can also be configured to automatically notify records managers when records are eligible for disposition.
16.	Provide a seamless integration of the ERMS (providing the records management logic) with an ECMS,	X			Yes. Laserfiche Records Management Edition encompasses both records management and content management functionality in a seamless, single environment.
17.	Records Manager Application will be a 100% Web-browser based application.	X			Yes. All records management configuration and management can be accomplished using web-browser based applications.
18.	Views file plans and retention and disposition policies.	X			Yes. Records managers can easily view records lifecycle policies, including retention and disposition policies, directly from the records folders in the Laserfiche Client.
19.	Provide interface capabilities to existing systems that create electronic records, via an application program interface (API) to integrate properly with the proposed ECMS.	X			Laserfiche provides a variety of methods to integrate with external applications that might be creating electronic records. If the application creates records in a file system location, Laserfiche Quick Fields Agent can be used to automatically import the records into the repository. Users could also potentially use Laserfiche Snapshot, our virtual printer driver, to

					save TIFF copies of the electronic records directly into Laserfiche. For applications where further customization is necessary, we also provide the Laserfiche SDK that allows custom integrations to be created with third party APIs/applications.
20.	ERP integration: support enterprise resource planning (ERP) systems APIs.	X			The Laserfiche SDK can be used to develop integrations with third party APIs or applications, including ERP systems. Out-of-the-box, Laserfiche Workflow also includes a set of enterprise integration activities that allow data to be both sent to and retrieved from compatible SQL, Oracle or otherwise ODBC compliant databases. This functionality allows Laserfiche to exchange information with a large variety of potential outside programs such as ERP systems.
21.	Typical Reports: Including, but limited to, the following:				
	o Ready for Destruction report	X			Yes. Records managers can use Laserfiche Search to easily run reports listing all records that are ready for destruction.
	o Future Disposition Schedules report	X			Yes. Records managers use Laserfiche Search to run reports on the future disposition schedules of records.
22.	Maintain the relationships between records and files, between file series and the file plan.	X			Yes. The configurable records folder structure in Laserfiche allows for an organizational and relationship

					structure that best fits your records and processes. Records folders can be created, named, and arranged to reflect your desired structure, and records can then be placed into the structure as necessary. Records lifecycle policies are applied at and inherited from the folder level, tying together the folder structure with the records rules that it represents.
23.	Retrieve information to comply with Freedom of Information Act / discovery requests.	X			Yes. Laserfiche Search allows users to search for and retrieve records according to nearly any property or piece of metadata associated with the record: record name, record type, retention policy, filing date, etc. This allows users to easily and powerfully find and report on any records for discovery purposes.
24.	Associate the contextual and structural data within a document.	X			Yes. Laserfiche is designed to associate all information about a document together and make it easy for users to view all document information from one location. For scanned documents, users are able to open a document in the Laserfiche Document Viewer, which can simultaneously display the structural data (i.e. document images) alongside with contextual data (i.e. metadata fields). For electronic documents, the structural data of the document itself will open in the document's native application, while the contextual metadata can be viewed by the simple click of a button

					within Laserfiche. Specifically for Microsoft Office electronic documents, Laserfiche features an out-of-the-box integration that allows users to view contextual metadata from inside the Office application for documents stored in Laserfiche.
25.	Construct and manage audit trails and track system usage by department and user.	X			Yes. Laserfiche Audit Trail provides for full auditing and reporting capabilities on actions taken within the Laserfiche repository, including records management actions. Reports can be created and customized to return whatever audit data is required, either in table or graph format.
26.	Manage the integrity and reliability of records once they have been declared as such.	X			Yes. Laserfiche Security is used to control access to records, and ensures that only appropriate users will have access to any given record. Additionally, when a record enters its retention period it is made read-only, so that records cannot be altered while being retained. Finally, the Laserfiche product suite is fully certified with the Victorian Electronic Record Strategy (VERS) requirements, a world-recognized standard for reliably and authentically preserving electronic records over long periods of time. VERS is endorsed by the State Government of Victoria, Australia, and is accepted and used as the backbone of e-Governance by archival institutions around the world.



27.	Identify records that are due for disposal when their prescribed retention periods elapse, managing the disposal process.	X			Yes. Laserfiche Search makes it simple to find all records that are eligible for disposition at a certain time. Records managers can then perform bulk disposition on all returned records. Laserfiche Workflow can also be configured to automatically notify records managers when records are eligible for disposition.
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E-Form Specifications		Out of the Box	Customization Required	3 rd Party Application	Comments
1.	Do your E-forms support the need to retain the look and feel of paper forms?	X			Yes. Laserfiche Forms includes an easy to use, drag-and-drop designer that allows users to create forms that mimic the look and feel of paper forms they are comfortable with. Laserfiche Forms features a large variety of configurable field types, such as text fields, dropdowns, checkboxes, etc. that can be used to custom build forms to fit your business process. Forms can also be extensively styled, such as changing text/label colors, label widths, background images, etc. to achieve the desired theme/look for the created forms. Finally, Laserfiche Forms also offers the ability to implement advanced customizations using CSS and JavaScript.
2.	Do your E-forms support E-signatures?		X		Currently, JavaScript customization would be required to add electronic signature support to a created form. Going forward, electronic signatures are a feature that is being targeted for release in a future version of Laserfiche Forms.
3.	Does your solution support public-facing E-forms that can be filled out and submitted on line?	X			Yes. The Laserfiche Forms Portal allows public, online submission of forms into Laserfiche.