

ORIGINAL

Content Management System

Laserfiche Solutions Group

Prepared for:

State of West Virginia
Lottery Commission

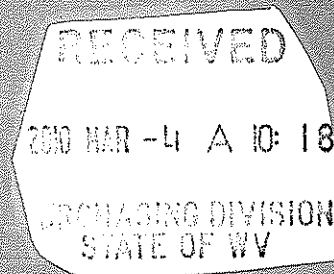
Response to:

Document Imaging and
Content Management System with
Integrated Workflow
RFP LOT454

January 25, 2010

Laserfiche®

Run Smarter®



January 25, 2010
Ms. Shelly Murray
Department of Administration
Purchasing Division
Building 15
2019 Washington Street, East
Charleston, WV 25305-0130

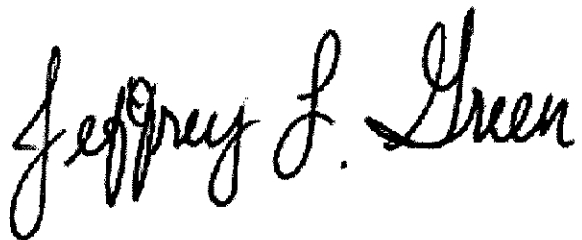
Dear Ms. Murray,

I am pleased to submit the attached response to your Request for Proposal LOT454 for a Document Imaging and Content Management System with Integrated Workflow. Compulink Management Center, Inc. (DBA Laserfiche) is the developer of the award-winning Laserfiche[™] enterprise content management software as well as a respected systems integrator and consultancy. We are a WBE and MBE corporation with a thirty-three year record of successful software development and implementation. Laserfiche software is engineered specifically to meet the document imaging, management and workflow needs of organizations like the State of West Virginia's Lottery Commission, and we are submitting this proposal to satisfy all the requirements stated in your RFP.

We are confident that after your review, you will find that Laserfiche will meet all of your needs. Laserfiche is well qualified to provide the State of West Virginia's Lottery Commission with the optimum solution for all of your demands.

We will be pleased to discuss this proposal and to provide a comprehensive demonstration of the proposed Laserfiche document management solution based on the use cases provided in your RFP. Choosing Laserfiche for the Lottery Commission will meet your objectives of allowing personnel to efficiently search, retrieve, distribute, and manage electronic and hard copy documents in an integrated environment. We at Laserfiche look forward to working with you on this important project.

Sincerely,



Jeffrey Green
Director, Laserfiche Solutions Group

Phone: 562.988.1688 x125
Fax: 562.988.1886
Email: Jeffrey.Green@laserfiche.com

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State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
 LOT454

PAGE
 1

ADDRESS CORRESPONDENCE TO ATTENTION OF
 SHELLY MURRAY
 304-558-8801

VENDOR

RFQ COPY
 TYPE NAME/ADDRESS HERE

SHIP TO

LOTTERY COMMISSION

312 MACCORKLE AVENUE, SE
 CHARLESTON, WV
 25314-1143 558-0500

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
12/09/2009				

ID OPENING DATE: 01/28/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>REQUEST FOR PROPOSAL</p> <p>THE WEST VIRGINIA PURCHASING DIVISION, FOR THE AGENCY, THE WEST VIRGINIA LOTTERY, IS SOLICITING PROPOSAL FOR A DOCUMENT IMAGING AND CONTENT MANAGEMENT SYSTEM WITH INTEGRATED WORKFLOW PER THE ATTACHED SPECIFICATIONS.</p> <p>MANDATORY PRE-BID</p> <p>A MANDATORY PRE-BID WILL BE HELD ON 01/06/2010 AT 1:30 PM AT THE WV LOTTERY HEADQUARTERS. ALL INTERESTED PARTIES ARE REQUIRED TO ATTEND THIS MEETING. FAILURE TO ATTEND THE MANDATORY PRE-BID SHALL RESULT IN DISQUALIFICATION OF THE BID. NO ONE PERSON MAY REPRESENT MORE THAN ONE BIDDER.</p> <p>AN ATTENDANCE SHEET WILL BE MADE AVAILABLE FOR ALL POTENTIAL BIDDERS TO COMPLETE. THIS WILL SERVE AS THE OFFICIAL DOCUMENT VERIFYING ATTENDANCE AT THE MANDATORY PRE-BID. FAILURE TO PROVIDE YOUR COMPANY AND REPRESENTATIVE NAME ON THE ATTENDANCE SHEET WILL RESULT IN DISQUALIFICATION OF THE BID. THE STATE WILL NOT ACCEPT ANY OTHER DOCUMENTATION TO VERIFY ATTENDANCE. THE BIDDER IS RESPONSIBLE FOR ENSURING THEY HAVE COMPLETED THE INFORMATION REQUIRED ON THE ATTENDANCE SHEET. THE PURCHASING DIVISION AND THE STATE AGENCY WILL NOT ASSUME ANY RESPONSIBILITY FOR A BIDDER'S FAILURE TO COMPLETE THE PRE-BID ATTENDANCE SHEET. IN ADDITION, WE REQUEST THAT ALL POTENTIAL BIDDERS INCLUDE THEIR E-MAIL ADDRESS AND FAX NUMBER.</p> <p>ALL POTENTIAL BIDDERS ARE REQUESTED TO ARRIVE PRIOR TO THE STARTING TIME FOR THE PRE-BID. BIDDERS WHO ARRIVE</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE _____ TELEPHONE _____ DATE _____

TITLE _____ FEIN _____ ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

GENERAL TERMS & CONDITIONS
REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)

1. Awards will be made in the best interest of the State of West Virginia.
2. The State may accept or reject in part, or in whole, any bid.
3. All quotations are governed by the *West Virginia Code* and the *Legislative Rules* of the Purchasing Division.
4. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
5. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30.
6. Payment may only be made after the delivery and acceptance of goods or services.
7. Interest may be paid for late payment in accordance with the *West Virginia Code*.
8. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
10. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
11. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract.
12. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
13. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
14. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, and available online at the Purchasing Division's web site (<http://www.state.wv.us/admin/purchase/vrc/hipaa.htm>) is hereby made part of the agreement. Provided that, the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
15. **WEST VIRGINIA ALCOHOL & DRUG-FREE WORKPLACE ACT:** If this Contract constitutes a public improvement construction contract as set forth in Article 1D, Chapter 21 of the West Virginia Code ("The West Virginia Alcohol and Drug-Free Workplace Act"), then the following language shall hereby become part of this Contract: "The contractor and its subcontractors shall implement and maintain a written drug-free workplace policy in compliance with the West Virginia Alcohol and Drug-Free Workplace Act, as set forth in Article 1D, Chapter 21 of the West Virginia Code. The contractor and its subcontractors shall provide a sworn statement in writing, under the penalties of perjury, that they maintain a valid drug-free work place policy in compliance with the West Virginia and Drug-Free Workplace Act. It is understood and agreed that this Contract shall be cancelled by the awarding authority if the Contractor: 1) Fails to implement its drug-free workplace policy; 2) Fails to provide information regarding implementation of the contractor's drug-free workplace policy at the request of the public authority; or 3) Provides to the public authority false information regarding the contractor's drug-free workplace policy."

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division.
2. **SPECIFICATIONS:** Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
3. Complete all sections of the quotation form.
4. Unit prices shall prevail in case of discrepancy.
5. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
6. **BID SUBMISSION:** All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
 LOT454

PAGE
 2

ADDRESS CORRESPONDENCE TO ATTENTION OF
 SHELLY MURRAY
 304-558-8801

VENDOR

RFQ COPY
 TYPE NAME/ADDRESS HERE

SHIP TO

LOTTERY COMMISSION

312 MACCORKLE AVENUE, SE
 CHARLESTON, WV
 25314-1143 558-0500

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
12/09/2009				

BID OPENING DATE: 01/28/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
001	1	LS		898-74		
<p>LATE, BUT PRIOR TO THE DISMISSAL OF THE TECHNICAL PORTION OF THE PRE-BID WILL BE PERMITTED TO SIGN IN. BIDDERS WHO ARRIVE AFTER CONCLUSION OF THE TECHNICAL PORTION OF THE PRE-BID BUT DURING ANY SUBSEQUENT PART OF THE PRE-BID WILL NOT BE PERMITTED TO SIGN THE ATTENDANCE SHEET.</p> <p>TECHNICAL QUESTIONS MUST BE SUBMITTED IN WRITING TO SHELLY MURRAY IN THE WEST VIRGINIA PURCHASING DIVISION VIA MAIL AT THE ADDRESS SHOWN AT THE TOP OF THIS RFP, VIA FAX AT 304-558-4115, OR VIA EMAIL AT SHELLY.L.MURRAY@WV.GOV. DEADLINE FOR ALL TECHNICAL QUESTIONS IS 01/08/2010 AT THE CLOSE OF BUSINESS. ALL TECHNICAL QUESTIONS RECEIVED, IF ANY, WILL BE ADDRESSED BY ADDENDUM AFTER THE DEADLINE.</p> <p>QUESTIONS CONCERNING THE ACTUAL PROCESS BY WHICH A VENDOR MAY SUBMIT A PROPOSAL TO THE STATE OF WEST VIRGINIA ARE NOT CONSIDERED TO BE TECHNICAL QUESTIONS AND MAY BE SUBMITTED AT ANY TIME PRIOR TO THE BID OPENING AND IN ANY FORMAT.</p> <p>DOCUMENT IMAGING AND CONTENT MANAGEMENT</p> <p>EXHIBIT 3</p> <p>LIFE OF CONTRACT: THIS CONTRACT BECOMES EFFECTIVE UPON AWARD AND EXTENDS FOR A PERIOD OF ONE (1) YEAR OR UNTIL SUCH "REASONABLE TIME" THEREAFTER AS IS NECESSARY TO OBTAIN A NEW CONTRACT OR RENEW THE</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
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TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE
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WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
 LOT454

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 3

ADDRESS CORRESPONDENCE TO ATTENTION OF
 SHELLY MURRAY
 804-558-8801

VENDOR

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SHIP TO

LOTTERY COMMISSION
 312 MACCORKLE AVENUE, SE
 CHARLESTON, WV
 25314-1143 558-0500

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12/09/2009				

BID OPENING DATE: 01/28/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>ORIGINAL CONTRACT. THE "REASONABLE TIME" PERIOD SHALL NOT EXCEED TWELVE (12) MONTHS. DURING THIS "REASONABLE TIME" THE VENDOR MAY TERMINATE THIS CONTRACT FOR ANY REASON UPON GIVING THE DIRECTOR OF PURCHASING 30 DAYS WRITTEN NOTICE.</p> <p>UNLESS SPECIFIC PROVISIONS ARE STIPULATED ELSEWHERE IN THIS CONTRACT DOCUMENT, THE TERMS, CONDITIONS AND PRICING SET HEREIN ARE FIRM FOR THE LIFE OF THE CONTRACT.</p> <p>RENEWAL: THIS CONTRACT MAY BE RENEWED UPON THE MUTUAL WRITTEN CONSENT OF THE SPENDING UNIT AND VENDOR, SUBMITTED TO THE DIRECTOR OF PURCHASING THIRTY (30) DAYS PRIOR TO THE EXPIRATION DATE. SUCH RENEWAL SHALL BE IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THE ORIGINAL CONTRACT AND SHALL BE LIMITED TO TWO (2) ONE (1) YEAR PERIODS.</p> <p>CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICES SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN.</p> <p>OPEN MARKET CLAUSE: THE DIRECTOR OF PURCHASING MAY AUTHORIZE A SPENDING UNIT TO PURCHASE ON THE OPEN MARKET, WITHOUT THE FILING OF A REQUISITION OR COST ESTIMATE, ITEMS SPECIFIED ON THIS CONTRACT FOR IMMEDIATE DELIVERY IN EMERGENCIES DUE TO UNFORESEEN CAUSES (INCLUDING BUT NOT LIMITED TO DELAYS IN TRANSPORTATION OR AN UNANTICIPATED INCREASE IN THE VOLUME OF WORK.)</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE</p>						

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State of West Virginia
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Request for Quotation

RFQ NUMBER
LOT454

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ADDRESS CORRESPONDENCE TO ATTENTION OF
SHELLY MURRAY 804-558-8801

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LOTTERY COMMISSION

312 MACCORKLE AVENUE, SE
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12/09/2009				

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LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
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CONTRACT NULL AND VOID AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER.

THE TERMS AND CONDITIONS CONTAINED IN THIS CONTRACT SHALL SUPERSEDE ANY AND ALL SUBSEQUENT TERMS AND CONDITIONS WHICH MAY APPEAR ON ANY ATTACHED PRINTED DOCUMENTS SUCH AS PRICE LISTS, ORDER FORMS, SALES AGREEMENTS OR MAINTENANCE AGREEMENTS, INCLUDING ANY ELECTRONIC MEDIUM SUCH AS CD-ROM.

REV. 05/26/2009

NOTICE

A SIGNED BID MUST BE SUBMITTED TO:

DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 BUILDING 15
 2019 WASHINGTON STREET, EAST
 CHARLESTON, WV 25305-0130

THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED:

SEALED BID

BUYER: SHELLY MURRAY

RFQ. NO.: LOT454

BID OPENING DATE: 01/28/2010

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
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TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE
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WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
 LOT454

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ADDRESS CORRESPONDENCE TO ATTENTION OF
 SHELLY MURRAY
 304-558-8801

RFQ COPY
 TYPE NAME/ADDRESS HERE

LOTTERY COMMISSION
 312 MACCORKLE AVENUE, SE
 CHARLESTON, WV
 25314-1143 558-0500

DATE PRINTED	TERMS OF SALE	SHIP VIA	FOB	FREIGHT TERMS
12/09/2009				

BID OPENING DATE: 01/28/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
BID OPENING TIME: 1 30 PM PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID: ----- 562-988-1886 ----- CONTACT PERSON (PLEASE PRINT CLEARLY): ----- ANDREW ALBERS ----- ***** THIS IS THE END OF RFQ LOT454 ***** TOTAL: _____						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE _____ TELEPHONE _____ DATE _____

TITLE _____ FEIN _____ ADDRESS CHANGES TO BE NOTED ABOVE

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State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

**Request for
 Quotation**

RFP NUMBER
 LOT454

PAGE
 1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
 SHELLY MURRAY
 304-558-8801

VENDOR

LASERFICHE
 4 STONECREST DRIVE
 HUNTINGTON WV 25701

SHIP TO

LOTTERY COMMISSION
 312 MACCORKLE AVENUE, SE
 CHARLESTON, WV
 25314-1143 558-0500

DATE PRINTED 02/08/2010	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
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BID OPENING DATE: 03/04/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
----- ADDENDUM NO. 2 -----						
THIS ADDENDUM IS ISSUED TO REVISE THE RFP SPECIFICATIONS AND TO ADDRESS THE QUESTIONS RECEIVED PRIOR TO THE QUESTION SUBMISSION DEADLINE OF 01/08/2010.						
ATTACHMENTS: REVISED RFP SPECIFICATIONS WITH ATTACHMENTS AND COMPACT DISK (CD) * REVISIONS TO SPECIFICATIONS MADE IN BOLD ITALIC FONT QUESTIONS AND RESPONSES PRE-BID SIGN IN SHEET						
THE BID OPENING DATE IS EXTENDED:						
FROM: 02/18/2010 TO : 03/04/2010						
0001	1	LS		898-74		
DOCUMENT IMAGING AND CONTENT MANAGEMENT						
EXHIBIT 10						
REQUISITION NO.: LOT454						
ADDENDUM ACKNOWLEDGEMENT						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
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TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE
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WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

A

**GENERAL TERMS & CONDITIONS
REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)**

1. Awards will be made in the best interest of the State of West Virginia.
2. The State may accept or reject in part, or in whole, any bid.
3. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
4. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods this Purchase Order/Contract becomes void and of no effect after June 30.
5. Payment may only be made after the delivery and acceptance of goods or services.
6. Interest may be paid for late payment in accordance with the *West Virginia Code*.
7. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
8. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
9. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
10. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern the purchasing process.
11. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
12. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
13. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, is available online at www.state.wv.us/admin/purchase/vrc/hipaa.htm and is hereby made part of the agreement. Provided that the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
14. **CONFIDENTIALITY:** The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures, and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in <http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf>.
15. **LICENSING:** Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, and the West Virginia Insurance Commission. The vendor must provide all necessary releases to obtain information to enable the director or spending unit to verify that the vendor is licensed and in good standing with the above entities.
16. **ANTITRUST:** In submitting a bid to any agency for the State of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the State of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, or person or entity submitting a bid for the same material, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division. Complete all sections of the quotation form.
2. Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as EQUAL to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
3. Unit prices shall prevail in case of discrepancy. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
4. All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130
5. Communication during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited (W.Va. C.S.R. §148-1-6.6).



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
LOT454

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ADDRESS CORRESPONDENCE TO ATTENTION OF:
SHELLY MURRAY
104-558-8801

RFQ COPY

TYPE NAME/ADDRESS HERE

VENDOR

LOTTERY COMMISSION

312 MACCORKLE AVENUE, SE
CHARLESTON, WV
25314-1143 558-0500

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
02/08/2010				

SID OPENING DATE: 03/04/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
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I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC.

ADDENDUM NO. S:

- NO. 1
- NO. 2
- NO. 3
- NO. 4
- NO. 5

I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS.

VENDOR MUST CLEARLY UNDERSTAND THAT ANY VERBAL REPRESENTATION MADE OR ASSUMED TO BE MADE DURING ANY ORAL DISCUSSION HELD BETWEEN VENDOR'S REPRESENTATIVES AND ANY STATE PERSONNEL IS NOT BINDING. ONLY THE INFORMATION ISSUED IN WRITING AND ADDED TO THE SPECIFICATIONS BY AN OFFICIAL ADDENDUM IS BINDING.

.....
 SIGNATURE
 2/20/10 LASERFICHE
 COMPANY
 2/20/10
 DATE

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
TITLE	FEN	ADDRESS CHANGES TO BE NOTED ABOVE

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25314-1143 558-0500

DATE PRINTED 02/08/2010	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
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BID OPENING DATE: **03/04/2010** BID OPENING TIME **01:30PM**

LINE	QUANTITY	UOP	CAT NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>NOTE: THIS ADDENDUM ACKNOWLEDGEMENT SHOULD BE SUBMITTED WITH THE BID.</p> <p>REV. 09/21/2009</p> <p>----- END OF ADDENDUM NO. 2 -----</p> <p>***** THIS IS THE END OF RFQ LOT454 ***** TOTAL: _____</p>						

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TITLE _____ FEIN _____ ADDRESS CHANGES TO BE NOTED ABOVE

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 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
LOT454

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF
SHELLY MURRAY 304-558-8801

BIDDING

RFQ COPY
 TYPE NAME/ADDRESS HERE

SHIP TO

LOTTERY COMMISSION

 312 MACCORKLE AVENUE, SE
 CHARLESTON, WV
 25314-1143 558-0500

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
01/22/2010				

BID OPENING DATE: 02/18/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
----- ADDENDUM NO. 1 -----						
THIS ADDENDUM IS ISSUED TO EXTEND THE TECHNICAL BID OPENING:						
FROM: 01/28/2010						
TO : 02/18/2010						
ANOTHER ADDENDUM WILL BE ISSUED TO ADDRESS THE QUESTIONS RECEIVED AND TO ISSUE THE PRE-BID SIGN IN SHEET.						
0001	1	LS		898-74		
DOCUMENT IMAGING AND CONTENT MANAGEMENT						
EXHIBIT 10						
REQUISITION NO.: LOT454						
ADDENDUM ACKNOWLEDGEMENT						
I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC.						
ADDENDUM NO.'S:						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

**GENERAL TERMS & CONDITIONS
REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)**

1. Awards will be made in the best interest of the State of West Virginia.
2. The State may accept or reject in part, or in whole, any bid.
3. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
4. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods this Purchase Order/Contract becomes void and of no effect after June 30.
5. Payment may only be made after the delivery and acceptance of goods or services.
6. Interest may be paid for late payment in accordance with the *West Virginia Code*.
7. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
8. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
9. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
10. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern the purchasing process.
11. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
12. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
13. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, is available online at www.state.wv.us/admin/purchase/vrc/hipaa.htm and is hereby made part of the agreement. Provided that the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
14. **CONFIDENTIALITY:** The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures, and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in <http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf>.
15. **LICENSING:** Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, and the West Virginia Insurance Commission. The vendor must provide all necessary releases to obtain information to enable the director or spending unit to verify that the vendor is licensed and in good standing with the above entities.
16. **ANTITRUST:** In submitting a bid to any agency for the State of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the State of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, or person or entity submitting a bid for the same material, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division. Complete all sections of the quotation form.
2. Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
3. Unit prices shall prevail in case of discrepancy. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
4. All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130
5. Communication during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited (W.Va. C.S.R. §148-1-6.6).



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

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PAGE
2

ADDRESS CORRESPONDENCE TO ATTENTION OF
SHELLY MURRAY B04-558-8801

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01/22/2010				

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LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
NO. 1					
NO. 2					
NO. 3					
NO. 4					
NO. 5					
<p>I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS.</p> <p>VENDOR MUST CLEARLY UNDERSTAND THAT ANY VERBAL REPRESENTATION MADE OR ASSUMED TO BE MADE DURING ANY ORAL DISCUSSION HELD BETWEEN VENDOR'S REPRESENTATIVES AND ANY STATE PERSONNEL IS NOT BINDING. ONLY THE INFORMATION ISSUED IN WRITING AND ADDED TO THE SPECIFICATIONS BY AN OFFICIAL ADDENDUM IS BINDING.</p> <p>..... SIGNATURE</p> <p>...LASER FICHE..... COMPANY</p> <p>...1/30/10..... DATE</p> <p>NOTE: THIS ADDENDUM ACKNOWLEDGEMENT SHOULD BE SUBMITTED WITH THE BID.</p> <p>REV. 09/21/2009</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS			
SIGNATURE	TELEPHONE	DATE	
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE	

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State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
LOT454

PAGE
3

ADDRESS CORRESPONDENCE TO ATTENTION OF
SHELLY MURRAY
804-558-8801

SUBJECT

RFQ COPY
 TYPE NAME/ADDRESS HERE

SHIP TO

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 312 MACCORKLE AVENUE, SE
 CHARLESTON, WV
 25314-1143 558-0500

DATE PRINTED	TERMS OF SALE	SHIP VIA	FOB	FREIGHT TERMS
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LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
----- END OF ADDENDUM NO. 1 -----						
***** THIS IS THE END OF RFQ LOT454 ***** TOTAL:						_____

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
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TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE
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Executive Summary

The State of West Virginia's Lottery Commission has solicited proposals for an Electronic Document Management System that can be deployed department wide. The objective is to provide a turn-key solution that includes an integrated electronic content management, workflow, electronic forms processing, and computer reports management solution.

The Laserfiche Solutions Group is submitting this proposal to deliver a fully integrated content management solution. While most Laserfiche solutions are sold and implemented through local resellers, the Laserfiche Solutions Group bids on projects that are deemed strategically important. We view these opportunities as mutually beneficial long term partnerships in which our customers benefit from this direct relationship and the specialized expertise of the software developer and we benefit from the invaluable feedback we receive as we continue to expand the capabilities of our software to meet the needs of organizations like the State of West Virginia.

Laserfiche is widely recognized as a pioneer in the document management industry and has been providing simple, elegant document management solutions that help organizations run smarter for more than 20 years. Our overriding philosophy has been that a successful solution is one that is utilized to its full potential by the people who should use it – regardless of the technical merits of the software. As we've continued to improve our software over the years, we've focused on delivering solutions that meet the global needs of an organization while remaining flexible enough to be uniquely configured for individual departments or groups of users. To validate this approach, we recently conducted a global study with The Economist Intelligence Unit to quantify the need to centralize and standardize information management processes while providing local business units with the autonomy they need to remain productive. The results of this research confirmed our approach and have helped us develop the strategy of "Disciplined Autonomy".

The core components of the proposed solution have been designed to deliver on the promise of Disciplined Autonomy. Laserfiche RIO bundles functionality so everyone granted access to the system will have the tools they need to utilize the solution to become more productive. Our ability to implement distributed capture and document processing workflow solutions will simplify the process of capturing, indexing and classifying content and allow the State to leverage their existing technical infrastructure. Our flexible and extensible workflow platform will automate business processes, keep other systems synchronized based on activity in the Electronic Content Management System and provide process oversight through ad-hoc and customized reports.

We're excited at the prospect of working with the State to deliver on the promise of the solution described in this proposal. We feel strongly that the technology, technical expertise and experience of our team are especially well suited to meet the business needs highlighted by the State in the RFP. Finally, we look forward to an opportunity to demonstrate the proposed solution and share our vision of an Electronic Content Management Solution for the State of West Virginia, Lottery Commission.

Corporate Overview

Corporate Overview

Compulink Management Center, Inc. (DBA Laserfiche) is a closely held, privately owned corporation. Incorporated in 1976 in California, the company started as a custom software development firm specializing in providing solutions to large scale, distributed information management problems. The corporation's Federal Employer Identification Number is 95-3010597. Development of the Laserfiche product began in 1987 and the product was first commercially available in 1988. Since then, we have pioneered several technologies in the document management field as we've continuously improved and expanded our product line. With more than 25,000 customers worldwide, our products have been trusted to solve the document management needs of customers in a large variety of industries and environments over the last 22 years.

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 us to focus on developing simple, elegant document management solutions that help organizations run smarter.

The Laserfiche Solutions Group is a team of technical experts who specialize in deploying enterprise document management solutions in cases we consider "strategically important". As a software developer with a strong reputation for incorporating customer feedback into our product offerings, we view these opportunities as long term partnerships where we get valuable feedback to continuously improve our software while our customers receive direct attention from the software developer.

Laserfiche is heavily focused on the public sector as it makes up over 50 percent of our yearly revenue. There are over 3,500 government entities worldwide utilizing Laserfiche in a production environment. In 2007 and 2008 alone, there were a total of 453 new government entities that purchased Laserfiche solutions.

The location of the firm's headquarters:

The vast majority of Laserfiche's 220 employees work out of the corporate headquarters in Long Beach, California with small satellite offices in Shanghai, China and Bedford, Massachusetts.

Laserfiche (Headquarters, Long Beach)
Long Beach, CA 90807
3545 Long Beach Blvd

The location of satellite office:

Laserfiche China
Unit A, 9/F
2000 PudongDaDao
Shanghai 200135
CHINA

Bedford, MA
 Laserfiche
 200 Great Road
 Suite 247
 Bedford, MA 01730

Experience in West Virginia:

List of Clients

CLIENT	CITY	STATE
<u>4 Most Health Network</u>	Charleston	WV
<u>Allied Benefit Administrators</u>	Huntington	WV
<u>Bagby, Weaver, & Chapman, AC</u>	Huntington	WV
<u>Bailes Craig & Yon</u>	Huntington	WV
<u>Baker, Lancianese & Conaty</u>	Huntington	WV
<u>BBS - Pocahontas County Clerks</u>	Marlinton	WV
<u>Benefit Design Services</u>	Huntington	WV
<u>Benefit Plans Services Inc.</u>	Huntington	WV
<u>Bloss & Dillard</u>	Huntington	WV
<u>Bluefield State College</u>	Bluefield	WV
<u>Cabell County EMS</u>	Huntington	WV
<u>Cabell County School Employee</u>	Huntington	WV
<u>Campbell Business Machines</u>	Belle	WV
<u>Capitol Neurology</u>	Charleston	WV
<u>City of Beckley</u>	Beckley	WV
<u>City of Ripley</u>	Ripley	WV
<u>CornerStone Technology Group</u>	Charleston	WV
<u>CPR Solutions Group, L.L.C.</u>	Charleston	WV
<u>CWV Tel Federal Credit Union</u>	Clarksburg	WV
<u>D & M Enterprises</u>	Huntington	WV
<u>E & G, Inc.</u>	Charleston	WV
<u>First Sentry Bank</u>	Huntington	WV
<u>Grant Memorial Hospital</u>	Petersburg	WV
<u>Greene, Ketchum, Bailey & Tweel</u>	Huntington	WV
<u>HCR Imaging</u>	White Sulphur Springs	WV
<u>Hino Motors Manufacturing</u>	Williamstown	WV
<u>Industrial Electrical Corporation</u>	Beaver	WV
<u>Innovative Mattress Solutions</u>	Winfield	WV
<u>Integrity Motor Vehicles</u>	Ironton	WV
<u>IRS/IRS-Admin. Services Center</u>	Beckley	WV
<u>Jackson County Development Center</u>	Millwood	WV
<u>Jackson General Hospital</u>	Huntington	WV
<u>Jim Robinson Toyota/Ford</u>	Triadelphia	WV
<u>Kanawha County Schools</u>	Charleston	WV
<u>Kanawha Manufacturing Company</u>	Charleston	WV
<u>Kanawha Valley Transit Authority</u>	Charleston	WV

<u>Kay Casto & Chaney PLLC</u>	Charleston	WV
<u>Lanier Professional Services</u>	Charleston	WV
<u>Logan General Hospital</u>	Logan	WV
<u>MacCorkle, Lavender & Casey</u>	Charleston	WV
<u>Medical Park FCU</u>	Wheeling	WV
<u>Morgantown Police Department</u>	Morgantown	WV
<u>NCompass Networks</u>	Huntington	WV
<u>North Central WV Community Action Association Inc.</u>	Fairmont	WV
<u>Offutt, Fisher & Nord</u>	Huntington	WV
<u>Parkersburg Police Dept.</u>	Parkersburg	WV
<u>Pinnacle Optical Image Storage</u>	Beckley	WV
<u>Priority Medical Claims</u>	Oceana	WV
<u>Professional Images</u>	Charleston	WV
<u>Putnam Aging Inc</u>	Saint Albans	WV
<u>Putnam General Hospital</u>	Hurricane	WV
<u>Raleigh County Emergency Services</u>	Helen	WV
<u>Raleigh County Emergency Services Authority</u>	Helen	WV
<u>SafeDoc</u>	Bridgeport	WV
<u>Short Chiropractic</u>	Barboursville	WV
<u>Solutions For Business</u>	Princeton	WV
<u>Tinney Law Firm PLLC</u>	Charleston	WV
<u>Tri-State Neuroscience</u>	Huntington	WV
<u>Union Carbide Corp.</u>	Charleston	WV
<u>West Virginia FCU</u>	Charleston	WV
<u>West Virginia Laborers Trust Fund</u>	Charleston	WV
<u>West Virginia University</u>	Parkersburg	WV
<u>Wheeling Hospital, Inc.</u>	Wheeling	WV
<u>Wind River Consulting, LC</u>	Beckley	WV
<u>Worthington Center Incorporated</u>	Parkersburg	WV
<u>WV Diet Drug Litigation</u>	Charleston	WV
<u>WV Laborers Trust Funds</u>	Charleston	WV

Financial Strength

Compulink Management Center, Inc. (DBA Laserfiche) is a closely held, privately owned corporation incorporated in 1976 in California. As a closely held, privately owned corporation it is our preference to not include sensitive financial information in a document that will ultimately become public information. In order to help the State validate the stability and financial strength of Laserfiche, we can provide the information in a separate envelope marked "Confidential – Audited Financial Statements" at a later time.

No change of ownership is anticipated in the foreseeable future. Laserfiche was founded by Nien-Ling Wacker who remains the primary owner and continues to run the company on a daily basis. Nien-Ling is widely recognized as an industry pioneer and has received numerous awards for her vision, leadership, philanthropy and entrepreneurial spirit.

Litigation

No personnel involved with this project have ever been involved in any claim, civil or criminal, against the Proposer. The Proposer filed a lawsuit in the Superior Court of the County of Los Angeles in October, 2003 to collect an amount it claimed due from a former sales agent of the Proposer. The Case was Compulink Management Center, Inc. v. L.R. Hines Consulting, Inc. et.al. Case # BC293947 asking for judgment of approximately \$70,000. A Cross Claim was filed by Mr. Hines alleging wrongful termination and similar matters. The case was settled in 2005 by mutual releases by both parties and payment to the Proposer of \$75,000. The Proposer has never had any litigation or claims against it by a user of its Software.

There is no pending or expected litigation, or other real or potential financial reversals, which might materially affect the viability or stability of the organization.

Section I – General Requirements

Content Management System Software

- The application creation process consists in applying the tools offered in this solution. They include:
 1. Setting the number of participants to the application.
 2. Setting the metadata and storage paths.
 3. Setting access and feature rights to applicable users.
 4. Creating and designing workflow rules and diagrams.
 5. Optimization using various Laserfiche tools, such as Import Agent, Quick Fields.
 6. Importing e-forms.
- The Laserfiche retention management system consists in configuring cutoff eligibility rules, defining retention schedules and final disposition. Records can then be filed in record series and record folders, allowing grouping of records by lifecycle and retention schedule.
- The Laserfiche solution makes full use of Active Directory and provides Laserfiche authentication. The solution provided is safe and allows administrators to manage users' security with the Administration Console. Feature rights control allows administrators to configure which tasks are permitted to users.
- In the Laserfiche Document Viewer, users have the ability to make all kinds of annotations (freehand, sticky note, highlight, redaction, stamp, line, rectangle, etc)
- Laserfiche partners with Fabsoft which provides the stream management features of this solution. Fabsoft can deal with all kinds of print streams: name, address, notes, company name, subject, number, etc. It can then send the information to printers, faxes, email systems, Laserfiche, etc.
- Laserfiche Quick Fields provides many image manipulation processes. It can rotate, skew, despeckle, smoothen, convert to black and white, crop, resize, and can run custom processes. Quick Fields can also add annotations to images by combining OCR and pattern matching. Important content can be automatically highlighted or extracted and used for field indexing. However, to preserve the integrity of the original image, images are stored in Laserfiche as TIFF files. Thus, once a file is imported into the Laserfiche system, only annotations are allowed to be appended to the original image, and in order to edit the original, it must be re-imported into the system as a new document.

3.1.1.1 Laserfiche:

- Is commercial off the shelf
- Is non proprietary
- Is Windows-based
- Uses object management
- Has an open architecture

3.1.1.2 Laserfiche is easily scalable and can handle thousands of concurrent users. It has 2 client interfaces; thick and thin.

- The thin client, *Laserfiche Web Access*, is web-based and allows users to securely access all their information via the Internet; it supports Internet Explorer and Firefox, and requires only an installation for the scanning component.
- The thick client, *Laserfiche Client*, is more solid and versatile, and using the *Windows User Interface*, it allows users to customize their interface, shortcuts, and add custom application buttons.

3.1.1.3 Laserfiche retains *Windows User Interface's* look and feel, along with toolbar customization capabilities. As illustrated in Figure 3.1.1.3a, all the main functions are readily accessible.

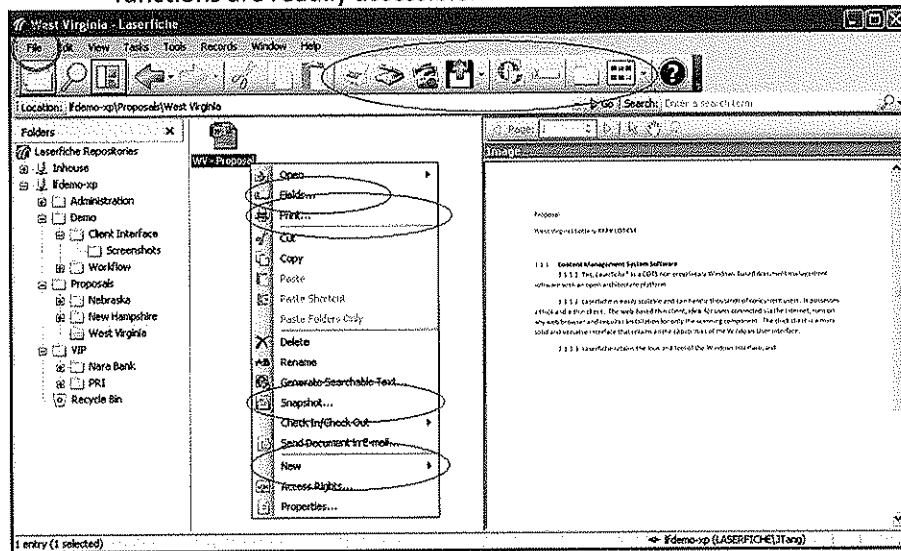


Figure 3.1.1.3a. Laserfiche Client Interface. The Laserfiche Client Interface is designed to enhance end-users' experience. Most important menu items are placed in their logical location (here circled in red). The toolbar is customizable and third-party application integrations buttons can be added to the toolbar.

3.1.1.4 Laserfiche allows users to store, retrieve, process, route, and index any type of electronic document.

		Yes	No
3.1.1.4.1	Images (black & white, grayscale, and color)	X	
3.1.1.4.2	Computer output reports data	X	
3.1.1.4.3	ODMA objects such as voice, video, word processing files	X	
3.1.1.4.4	Foreign files must be able to remain in native format	X	

3.1.1.5 Laserfiche supports Microsoft Windows Server 2003 and Windows XP and higher.

3.1.1.6 Laserfiche supports all the following features.

		Yes	No
3.1.1.6.1	Zooming In & Out	X	
3.1.1.6.2	Redaction and redaction security	X	
3.1.1.6.3	Cut & Paste	X	
3.1.1.6.4	Printing only specific areas of a document	X	
3.1.1.6.5	Sticky views	X	
3.1.1.6.6	Magnifying areas of a document	X	
3.1.1.6.7	Rotate & Pan	X	
3.1.1.6.8	Inverting of document pages	X	
3.1.1.6.9	Rubber stamp with security	X	
3.1.1.6.10	Document Check-in/Check-out	X	
3.1.1.6.11	Cascade and tiling	X	
3.1.1.6.12	Automatic scaling of images (height, width, Fit-to-Window, or User-defined)	X	
3.1.1.6.13	Display Black & White in Grayscale	X	
3.1.1.6.14	Specify display fonts and print fonts	X	

3.1.1.7 Yes, Laserfiche uses the Microsoft .NET platform.

3.1.1.8 Laserfiche's *Integrator's Toolkit* offers a collection of commands and documentation that allows programmers to integrate system solutions with third party applications, customize system functionality and automate Laserfiche-related tasks.

3.1.1.9 Laserfiche's *Integrator's Toolkit* allows users to reference and interact with Laserfiche objects via third-party applications.

3.1.1.10 Yes, Laserfiche allows central and remote administration. In order to distribute and alleviate processor resources, Laserfiche is logically broken down into different components: the Laserfiche Server, the Web Server, the Scanning/Document Processing workstation(s), the Workflow Server, the Audit Trail Server, and the SQL Server(s). Thus, the architecture of each Laserfiche system is unique to the organization and its functions. Since Laserfiche is transparent with Windows, setting up remote administration

means setting up a remote desktop connection for an administrator Windows account to the component server (Laserfiche Server, Audit Server, Web Server, and Workflow), which runs the particular Laserfiche service. However, it isn't necessary to remote into the specific servers to manage the Laserfiche component. System administrators can perform remote management via the Administration Console (illustrated in Figure 3.1.1.11a), pertaining to security, access, metadata management, storage, indexing, records management, checked out documents, and other server settings. On the other hand, the Web Access configuration page system administrators to configure the behavior of the web, or thin, client (illustrated in Figure 3.1.1.10a).

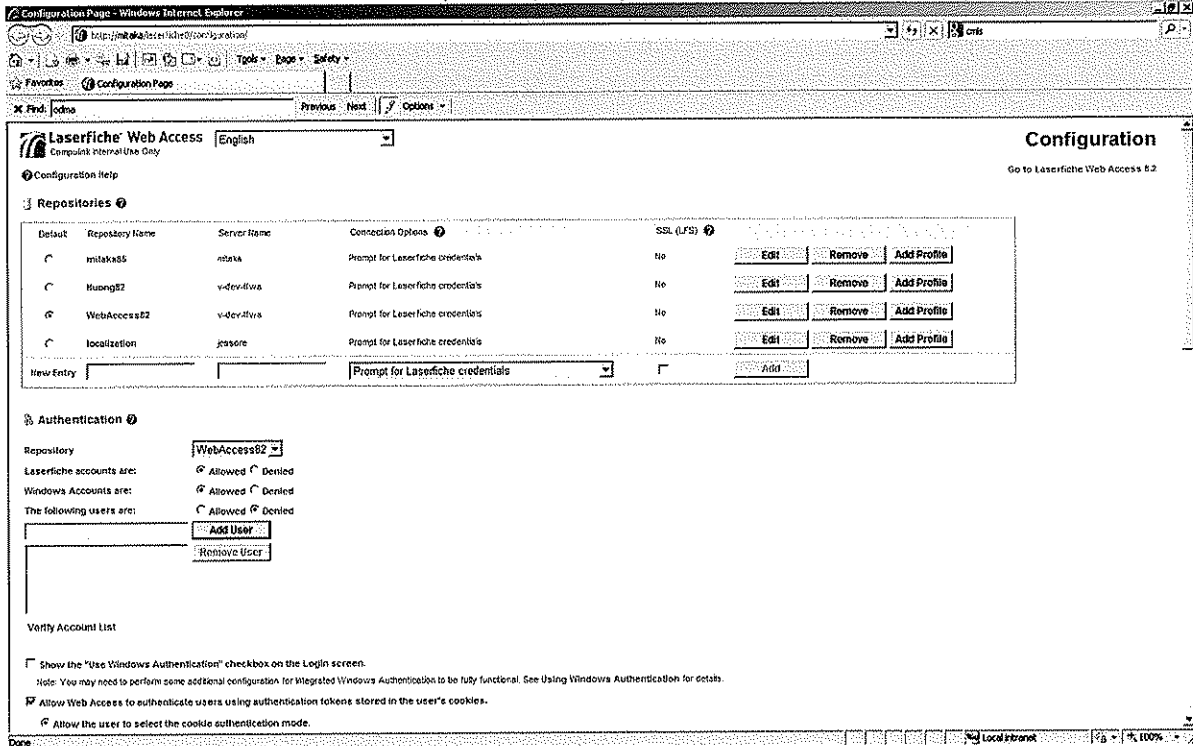


Figure 3.1.1.10a. Laserfiche Web Access Configuration Page. From the thin client configuration page, administrators can configure the published repositories, the web authentication process used, the e-mail server used, the watermarks, the configuration page access, the logging and the export settings.

3.1.1.11 The Laserfiche Administration Console provides all the information required for system administrators (see Figure 3.1.1.11a). All system and application errors are logged in the Windows Event Viewer, thus the system can be configured to send e-mail notifications via the Windows Event Viewer "Attach Task To This Event..." function.

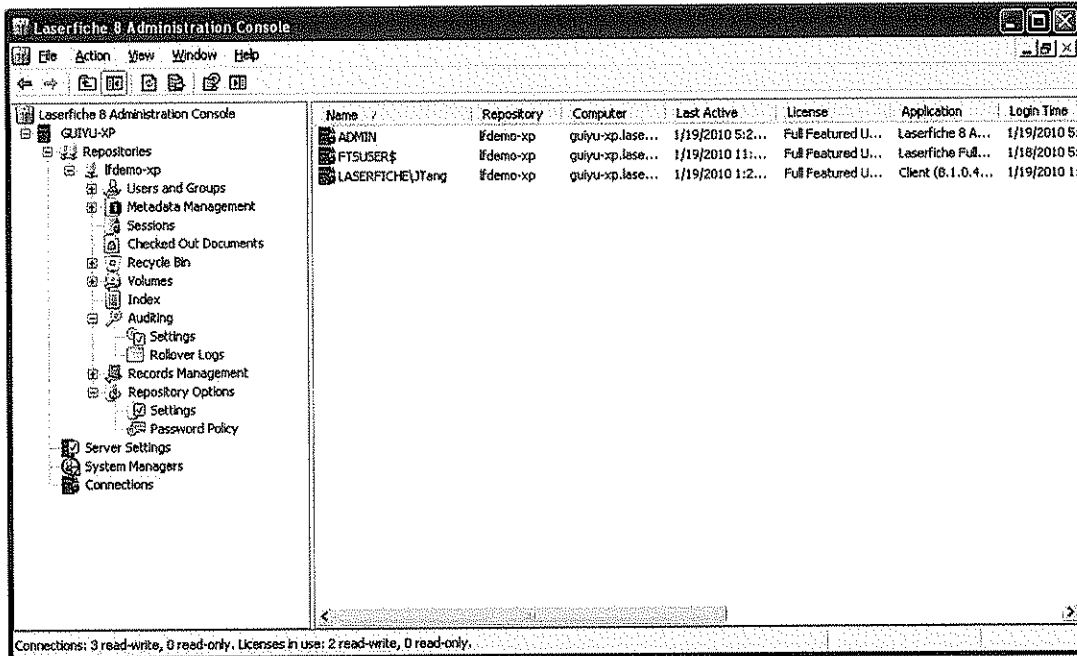


Figure 3.1.1.11a. Laserfiche Administration Console. Central management of the entire Laserfiche system. It requires login credentials upon launching.

- 3.1.1.13 Yes, Laserfiche is transparent to Windows and retains all of its functions over any Windows-based intranet and Internet network configuration.
- 3.1.1.14 Yes, Laserfiche supports OLE-DB and ODBC-compliant database connections and it supports Microsoft SQL and Oracle Servers.
- 3.1.1.15 Laserfiche fully supports Microsoft SQL Server 2005 and higher.
- 3.1.1.16 Laserfiche is ODMA and CMIS compliant. It automatically integrates with all Microsoft Office Suite applications and can equally do so with any third-party applications using its API.
- 3.1.1.17 Laserfiche is DoD 5015.2-certified for Records Management, and allows records retention policy configurations (see Figure 3.1.1.17a). The Laserfiche RME allows records to be eligible for cutoff by time and/or event condition. Once cutoff, the record is held in inactivity until it reaches the end of the retention schedule and disposed accordingly.

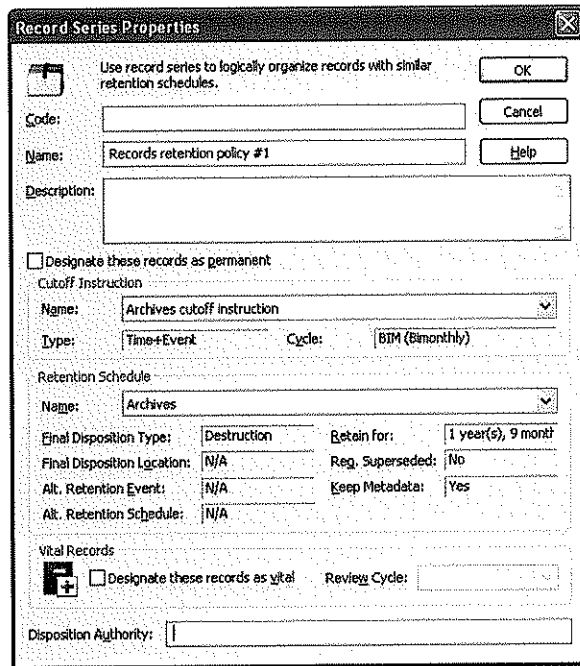


Figure 3.1.1.17a. Records Retention Configuration Dialog in Laserfiche. This menu is designed to emulate different records retention policies by selecting the cutoff instruction and the retention schedule. These are conveniently configured in the Administration console (Figure 3.1.1.11a) under the Records Management node.

- 3.1.1.18 Laserfiche Records Management is DoD 5015.2 certified, and can model any records management structure that comprises of cutoff instructions (determine when active records become inactive) and retention schedules (determine how long to retain inactive records and how to dispose of them).
- 3.1.1.19 For data protection and disaster recovery, Laserfiche supports Distributed File System, File System Mirroring, and SQL Database Mirroring. As for the back-up site system, one simple failover system is to install Laserfiche without starting the services. Thus the required files are synchronized from the main site until they are required to be written directly by the Laserfiche services.
- 3.1.1.20 Yes, Laserfiche supports EMC Symmetrix DMX SAN and can store images and index data on both sites.
- 3.1.1.21 Yes, Laserfiche can archive to EMC Centera. It has been previously tested.
- 3.1.1.22 Laserfiche can be transparently implemented on West Virginia Lottery's network infrastructure. As mentioned in 3.1.1.21, Laserfiche can function with EMC storage devices and add on to the efficiency of a complete content management solution.
- 3.1.1.23 This subsection has been deleted.

3.1.1.24 The recommended specifications are:

Product Name	Specs
SQL Server	2 Quad-Core Intel Xeon E5540 Processor (2.53 GHz, 1066MHz FSB), 36GBs RAM, RAID 1 146GBs, Microsoft Windows Server 2008 Standard x64, Microsoft SQL Server 2008 Standard
Laserfiche Application Server	2 Quad-Core Intel Xeon E5540 Processor (2.53 GHz, 1066MHz FSB), 12GBs RAM, RAID 1 146GBs, Microsoft Windows Server 2008 Standard x64, VMWare ESXi 4.0 Server
Laserfiche Web Access*/Audit Reporting/LincDoc	2 Quad-Core Intel Xeon E5540 Processor (2.53 GHz, 1066MHz FSB), 12GBs RAM, RAID 1 146GBs, Microsoft Windows Server 2008 Standard x64, VMWare ESXi 4.0 Server
Laserfiche Workflow/Fabsoft Reform	2 Quad-Core Intel Xeon E5540 Processor (2.53 GHz, 1066MHz FSB), 12GBs RAM, RAID 1 146GBs, Microsoft Windows Server 2008 Standard x64, VMWare ESXi 4.0 Server
Backup Server/VMWare Infrastructure	1 Quad-Core Intel Xeon E5520 Processor (2.26 GHz, 1066MHz FSB), 6GBs RAM, RAID 1 73GBs, Microsoft Windows Server 2008 Standard x64
DAS for Disk Based Backup	PowerVault MD1000 External Storage Array, SAS and SATA support
Tape Back-up Device	PowerVault 114T, LTO-3 Tape Rack Enclosure, 2 Drive
Development Environment	2 Quad-Core Intel Xeon E5540 Processor (2.53 GHz, 1066MHz FSB), 12GBs RAM, RAID 1 146GBs, Microsoft Windows Server 2008 Standard x64, VMWare ESXi 4.0 Server
Training/Test Environment	2 Quad-Core Intel Xeon E5540 Processor (2.53 GHz, 1066MHz FSB), 12GBs RAM, RAID 1 146GBs, Microsoft Windows Server 2008 Standard x64, VMWare ESXi 4.0 Server
Laserfiche Storage Tape Back-up Device	Existing OCIO Enterprise SAN SCSI LTO-4 Ultrium 1840 Drive
Virtual Center Management	1 Dual-Core Intel Xeon 5150 Processor (2.66 GHz, 1333 FSB)
Storage Networking Rack Mount Accessories Flat Panel Monitor, Keyboard, Mouse Keyboard/Monitor/Mouse Switch Box (8 Port/1U) 12" CPU-to-Switch Cable R3000 XR UPS (Low Voltage)	Cisco Catalyst 3750G-24TS
<p>*Note that a single Web Access server has been specified as part of the solution. It is expected that as the system grows, additional web servers may need to be added. The proposed architecture makes adding web servers a fairly trivial task and Microsoft's Network Load Balancing can be used to load balance the web-based application. If the total number of web servers needs to be provided as part of the RFP, that information is available.</p>	
Desktops	



Workstation

Intel® Core™2 Duo E7200 processor (2.53 GHz, 3
MB L2 cache, 1066 MHz FSB)
4 GB 800 MHz DDR2 SDRAM
160 GB 7200 rpm SATA NCQ

19-inch LCD Monitor (recommended two
per scan station)

- 3.1.1.25 Laserfiche allows full customization of feature rights, privileges, and access rights at the repository, the folder, the document, and the metadata levels. They can be configured for individual users or groups of users (see Figure 3.1.1.25a).

The screenshot shows the 'New User' dialog box with the following details:

- General Tab:** Name: Jean Bon; Description: (empty).
- Authentication Section:**
 - Domain accounts: (empty list)
 - Allow users to log in with password
 - Password: (masked with dots) [Generate Password...]
 - Verify Password: (masked with dots)
 - Ignore maximum password age
 - User cannot change password
 - User must change password at next login
 - Temporary password expires after 24 hours
- Bottom Section:**
 - Only allow read-only access (Manage Trustees privilege bypasses this setting)
 - Disable this user
- Buttons:** OK, Cancel, Help

Figure 3.1.1.25a. New User Configuration Dialog. This dialog allows the creation of new Laserfiche users and the configuration of belonging groups, rights, tags, auditing settings and attributes.

- 3.1.1.26 Laserfiche PC and Web based clients have the same functionalities. They are able to store, retrieve, display, print, e-mail, fax, route and index in the same manner.
- 3.1.1.27 Yes, Laserfiche is designed with the look and feel of Windows and is compliant with Windows protocols such as print, fax, export and e-mail.

3.1.1.28 Yes, Laserfiche supports thumbnails document view (see Figure 3.1.1.28a)

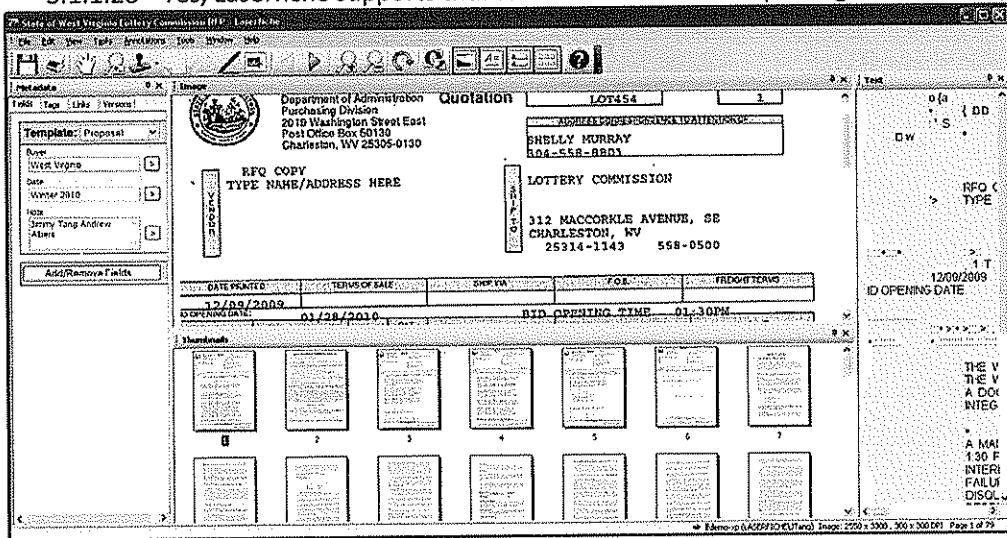


Figure 3.1.1.28a. Laserfiche Document Viewer Window with Thumbnails. The Document Viewer Window comprises of dockable and adjustable panels showing the image, the text, the metadata and the thumbnails.

3.1.1.29 As illustrated in Figure 3.1.1.28a, annotation tools are placed in the toolbar. Laserfiche annotations consist of “Stamps”, “Sticky Notes”, “Highlight”, “Redaction”, “Edit Text”, “Underlining”, “Strikethrough”, etc (see Figure 3.1.1.29a).

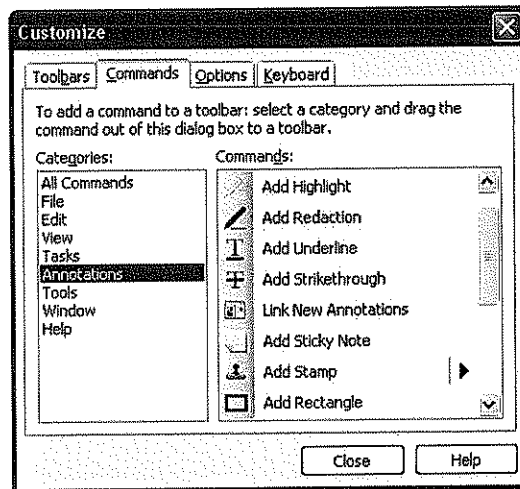


Figure 3.1.1.29a. Toolbar Customization Dialog. Laserfiche offers many more annotation tools. They can be added to the toolbar from this menu.

- 3.1.1.30 Document redaction is supported and can be set as visible to only authorized users.
- 3.1.1.31 The Laserfiche security allows document revision to only authorized users (see Figure 3.1.1.31a).

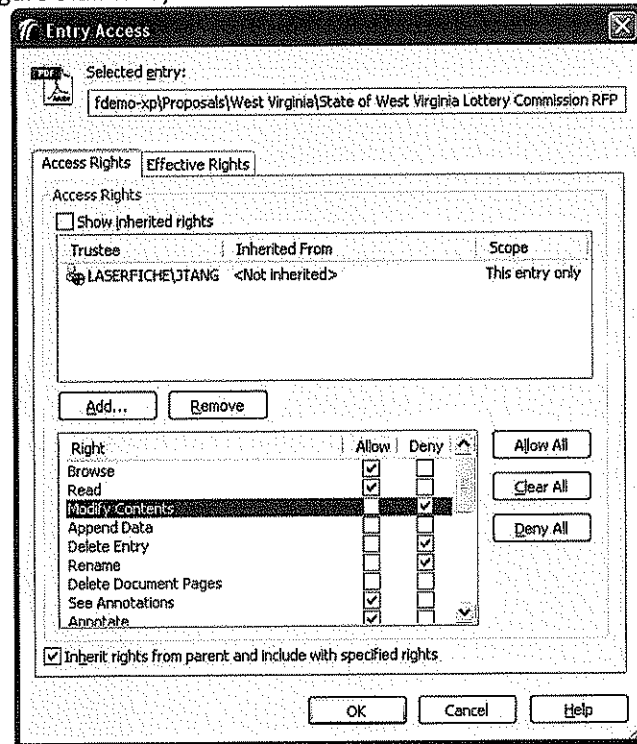


Figure 3.1.1.31a. Entry Access Dialog. Entry access rights can be configured at the repository, folder and document levels by system administrators possessing the "Manage Entry Access" Feature Right.

- 3.1.1.32 Yes, Laserfiche supports replacement of documents and pages.
- 3.1.1.33 Yes, Laserfiche supports Adobe iFilter, and retains all the editing tools.
- 3.1.1.34 Yes, Laserfiche stores all electronic documents in their native formats. They can be opened with their respective applications within the Laserfiche interface.
- 3.1.1.35 Laserfiche can combine multiple image file types into a single document. Once a document entry is created in Laserfiche, users can drag and merge new images into that document directly; thus giving the ability to easily append related files to existing documents.
- 3.1.1.36 Yes, the Laserfiche Search engine is optimized to narrow down search results. As illustrated in Figure 3.1.1.36a, there are a number of search criteria and tools available to find documents. The search engine supports the use of wildcards in fields or full-text searches, and the fuzzy search feature allows users to perform searches while specifying a percentage of accuracy in

matching letters greater than or equal to, and less than or equal to search expressions.

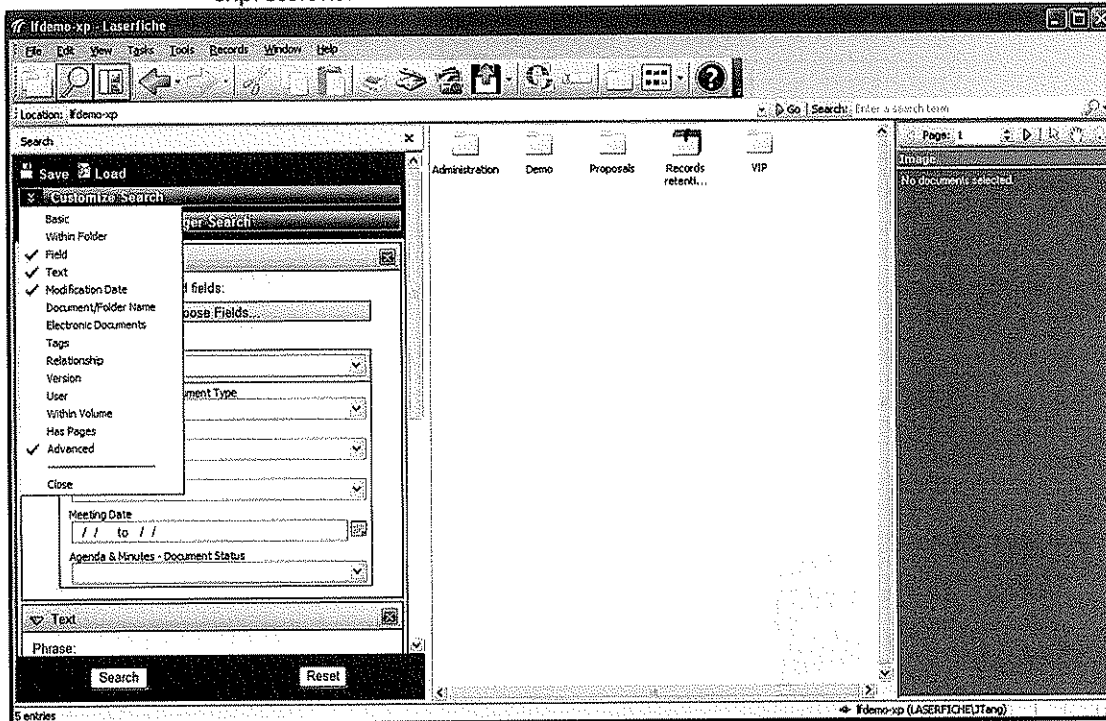


Figure 3.1.1.36a. Search Criteria Configuration. The Laserfiche Search engine allows users to customize their search by different criteria and make combination of those criteria using operators such as "And", "Or", "Not", "Within", and "Search in Phrase".

- 3.1.1.38 Results are displayed in "context hits" format and are highlighted in their original document view. The user has the ability to see and quickly navigate through each search result occurrence.
- 3.1.1.39 Search results can be sorted by any index value, and context hits are sorted in their chronological order in the document. Users can print, export, e-mail, realign and save column positions (see Figure 3.1.1.39a).

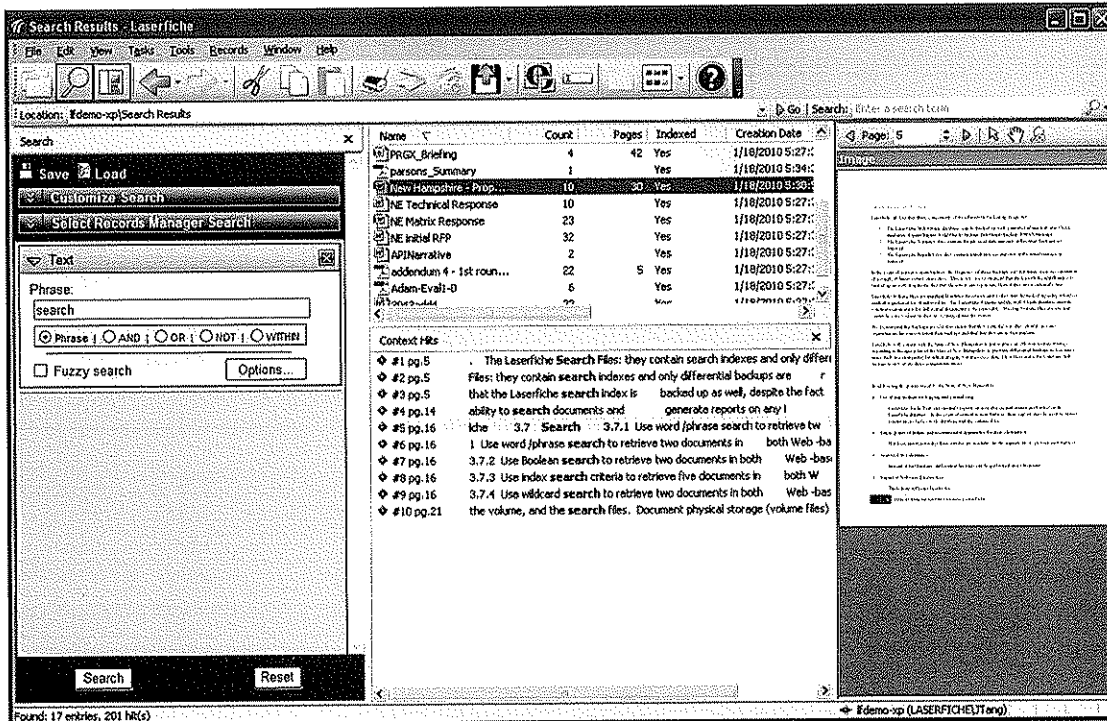


Figure 3.1.1.39a. Search Results Interface. The Laserfiche Search engines returns documents that meet the search criteria, along with the context hits and highlighted occurrences in the original document. The “Details” view allows the user to sort search results by any indexing data.

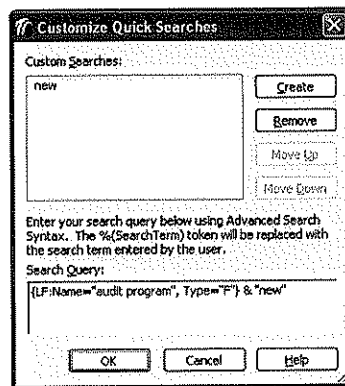


Figure 3.1.1.40a. Customize Quick Searches. The Quick Search function is accessible from the main window and can save frequently used searches.

3.1.1.41 The Laserfiche Search engine is capable of searching through the indexing information of any application file. For electronic files, the image can be displayed after running Snapshot® on the document.

3.1.1.42 There is no limit to the number of imaging applications. User access requires login user name and password in order to secure a connection to the Laserfiche Server.

3.1.1.43 Laserfiche application building is inherent to the system and requires no programming or database development.

3.1.1.44 Laserfiche index fields have the following properties (see Figure 3.1.1.44a): Name, Description, Type (character, list, number, date, integer, long integer, date/time, time, data), Width, Default Value, Multiple Values, Required, Constraint (see Figure 3.1.1.44b)

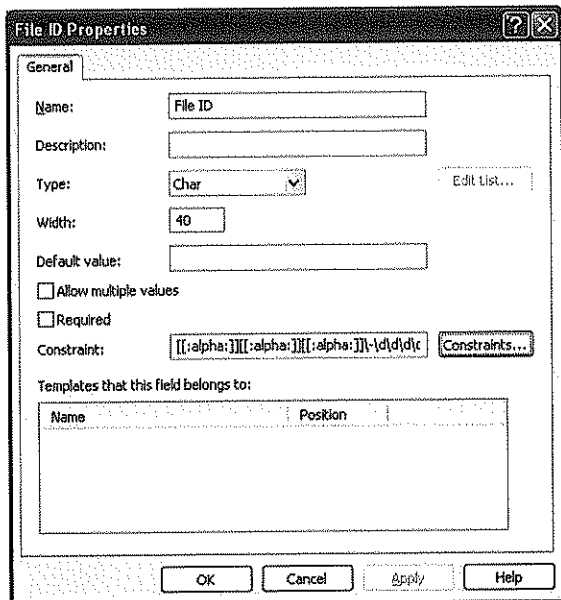


Figure 3.1.1.44a. Index Field Properties Dialog. Each index field can be configured to retain the desired information, and security access can prevent certain users from viewing important information.

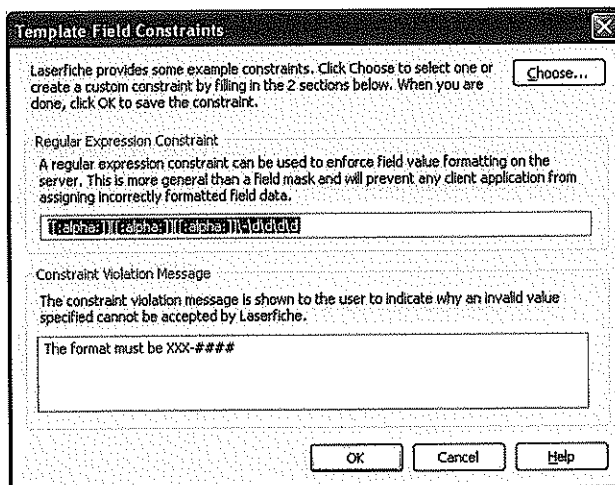


Figure 3.1.1.44b. Template Field Constraint Dialog. Using regular expressions can place formatting constraints on field value.

3.1.1.45 Index fields' constraints use regular expressions, as illustrated in Figure 3.1.1.44b.

3.1.1.46 This section intentionally left blank.

Computer Generated Reports

- 3.1.1.47 Laserfiche Quick Fields is an application designed to automate text extraction, indexing, image enhancement, and sorting. By adding processes to a queue list, documents are identified, processed, and then stored, according to your business process. Furthermore, Laserfiche partners with Fabsoft.

Fabsoft Reform

The proposed solution utilizes the Fabsoft Reform printer (Fabsoft is a Laserfiche Professional Development Partner) to capture, format, index and file output from line-of-business and back office applications as documents in Laserfiche. The integrated functionality of FabSoft and Laserfiche provides the ability to analyze report output and separate reports into individual sections or documents for routing, markup and security purposes.

Because the FabSoft component files reports as documents in Laserfiche, they can be included in any workflow rule - rules specific to routing reports or rules that bring reports into processes involving other documents, forms, etc.

The system will be configured to automatically extract data from reports and use that information to index, file and classify them in Laserfiche. The system will be configured to automatically extract values from captured reports and use that information to index the reports. Reports can share index fields (and even collections of fields) with other reports, documents, etc. so performing a search will bring up all related objects. Index values can be used to link reports to other content (documents, audio files, etc.) by relationship and linked documents would be listed in the metadata pane when viewing a report.

Because reports are converted into imaged documents in Laserfiche, they can be annotated using the Laserfiche annotation tools such as redaction, highlight, sticky note, stamp, underline, strikethrough, call out text, file attachment, etc.

- 3.1.1.47.1 Yes, Fabsoft supports ASCII and PDF print streams. Other formats are supported.
- 3.1.1.47.2 This subsection has been deleted.
- 3.1.1.47.3 Yes, Fabsoft automatically brings the generated reports into the Laserfiche system. Laserfiche Workflow can then automatically start Quick Fields to process the reports.
- 3.1.1.47.4 Fabsoft can automatically extract the text using OCR technology to allow full text search document retrieval.
- 3.1.1.47.5 Fabsoft can compress image quality before storing the TIFF image on the hard disk. Alternatively, Laserfiche Workflow can monitor Laserfiche folders and execute compression tasks via any third-party compression application.

- 3.1.1.47.6 Fabsoft and Laserfiche Workflow can execute custom scripts that utilize information extracted from native Quick Fields processes. Pattern matching is an effective tool to extract any type of data organized in a certain format. Using this feature with custom scripting and Workflow would allow the system to automatically compile custom reports, whose contents have been pre-defined, and to implement in a business process.

Section II – Capture and Electronic Forms

Document Capture and Electronic Forms Capture

- Laserfiche Quick Fields automates the capturing, indexing and routing of documents. With the real time lookup, combined with the OCR and pattern matching, the index fields can be populated from third party databases or from the information stored in the document. This allows the documents to be automatically routed to the correct Laserfiche folder path.
- Laserfiche Quick Fields offers a set of tools to improve the quality of imported images. Ultimately, it is important that all information present on the document is readable and can be extracted by the Optical Character Recognition engine, so that they can be used for indexing or retrieval. These processes are: deskew, despeckle, smooth, auto-rotate, resize, convert to black and white or grayscale.
- The e-form and digital signature solutions are handled by the integration with LincDoc and Cosign (refer to 3.1.2.15.2).

3.1.2.1 Laserfiche Quick Fields supports batch scanning. With its three stage process functionality, scanned documents are first identified, processed according to the type of document, and finally stored in their right locations.

3.1.2.2 Laserfiche Quick Fields supports barcode recognition and OCR. Scanned documents are sent to a centrally managed location, which is accessible via intranet or the Internet.

3.1.2.3 Laserfiche Quick Fields has a set of image enhancement tools, including de-skew, auto-rotate, de-speckle, and image smoothing, black and white or grayscale filtering.

3.1.2.4 Documents can be sent directly into Laserfiche from the digital copier, or to a network filing location, monitored by Laserfiche Import Agent, which can automatically import, rename and index.

3.1.2.5 Yes, Laserfiche Quick Fields has all the following functions: de-skew, alignment, line removal, de-speckle, invert black and white, and color enhancements (contrast, brightness, sharpness and intensity).

3.1.2.6

- 3.1.2.6.1 Supported.
- 3.1.2.6.2 Supported.
- 3.1.2.6.3 Supported.

3.1.2.7 Laserfiche supports almost any imaging devices that use TWAIN, ISIS or KOFAX. The provided capture solution can access the system database from a Desktop or a Web client.

3.1.2.8 The documents can be scanned directly into Laserfiche from both desktop scanners and digital copiers. Back-end functionality scans documents that possess matching criteria such as barcodes, particular document layout, or specific texts, and processes/sorts documents automatically or manually by allowing users to index new documents.

3.1.2.9 Laserfiche Quick Fields Agent automatically scans different document types from any local or network locations according to specified schedules (see Figure 3.1.2.9a)

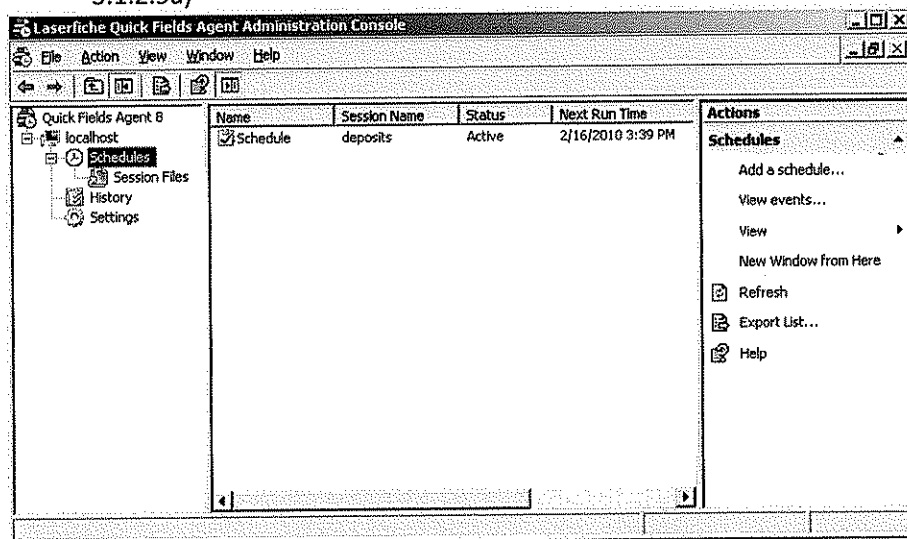


Figure 3.1.2.9a. Quick Fields Agent Administration Console. This Laserfiche application automatically imports documents, auto-indexes and sorts them on the specified schedules.
Note: For document importing without automatic processing and indexing, the Laserfiche Product Suite offers Import Agent.

3.1.2.10 Quick Fields Agent and Import Agent allow for direct import of images as batch queue for manual and automatic indexing.

3.1.2.11 Quick Fields Lookup matches a primary key, a barcode, an OCR'ed text or a related field with any database table, and completes selected indexing information.

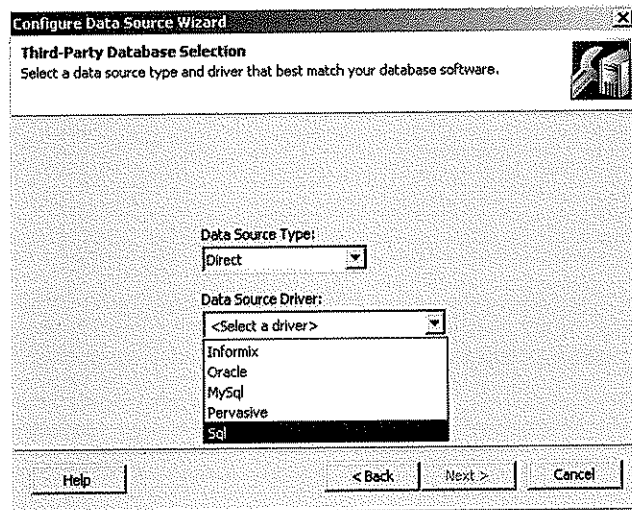


Figure 3.1.2.11a. Quick Fields Database Lookup. The Quick Fields Database Lookup function supports ODBC, Direct connections and Connection strings. MS Excel, MS Access, SQL and Oracle databases are amongst selectable data sources.

- 3.1.2.12 Electronic forms server connections will be SSL encrypted.
- 3.1.2.13 Submitted electronic forms automatically update the corresponding Microsoft SQL database by creating a new repository entry, with the completed form image and selected metadata.
- 3.1.2.14 The e-form solution allows users to search the Laserfiche or any third-party database in order to complete the associated fields.
- 3.1.2.15 E-forms are created from Microsoft Word or Adobe Acrobat. By entering field syntax (<< *field name* >>) in the Word document or placing edit box in the PDF file, the e-form is automatically generated and filled out with the desired document layout.
 - 3.1.2.15.1 E-forms graphics (logos and images) can be added to the original Microsoft Word or Adobe Acrobat PDF file.

- 3.1.2.15.2 The digital signature solution integrates with the e-form solution to provide PKI digital signature of the e-forms.

ARX Cosign

CoSign® for Laserfiche adds digital signatures to the Laserfiche environment simply and intuitively, enabling electronic signing and sealing of documents within the Laserfiche repository and workflow. CoSign makes it easy to digitally sign transactions, documents and records by embedding the standard signature technology directly into mainstream business applications. CoSign produces a signature record for every signature it captures. This Portable Signature Format (CoSign PSF™) allows anyone to seamlessly verify and retain proof of identity, intent, and document integrity without costly, complicated, or proprietary software.

The technology behind CoSign digital signatures is based on an industry standard Public Key Infrastructure (PKI). With PKI, each user has a key-pair, a Private Key, and a Public Key used in every signature. Documents can then be signed by a Public Key, stored in Laserfiche and opened by a user with the corresponding Private Key. Alternatively, for documents requiring multiple signatures, workflow can route the document to users that can then sign a document with the correct public key.

- 3.1.2.15.3 E-form supports SSL encryption between the browser and the e-form server. Subsequently, the e-form server and the repository server also support SSL encryption.
- 3.1.2.15.4 The e-form solution has local field level pop up style help that can be associated with each field. Input constraints for each field help the form originator input the data more correctly. These input constraints also support input constraint warning message, all of which help field input and completion.
- 3.1.2.15.5 The e-form solution supports attachment handling. Multiple attachments can be accommodated on a single form and sent to Laserfiche.
- 3.1.2.15.6 The e-form solution and the e-form creation engine have built-in logic, field calculation, field validation and conditions. Additionally, the e-form solution supports customization in Javascript and HTML, for user interaction and help, and custom section headers.
- 3.1.2.15.7 The e-form solution has wizard driven help files that support the form and field creation, and conditions.
- 3.1.2.16 The e-form solution is available to an unlimited number of users, at no per-user charge. E-forms can be made available to public on external website or internally through authentication.
- 3.1.2.17 Yes, users can view, print and save their e-forms locally.
- 3.1.2.18 E-forms are sent to the document management repository with the filled information. Different workflows can then be initiated depending on any field value/metadata.

3.1.2.19

The e-form solution LincDoc system diagrams are illustrated in Figure 3.1.2.19a and 3.1.2.19b. There are two configurations possible with the document management system for the e-form solution: the e-form server can be hosted or non-hosted, based on West Virginia Lottery's preference.

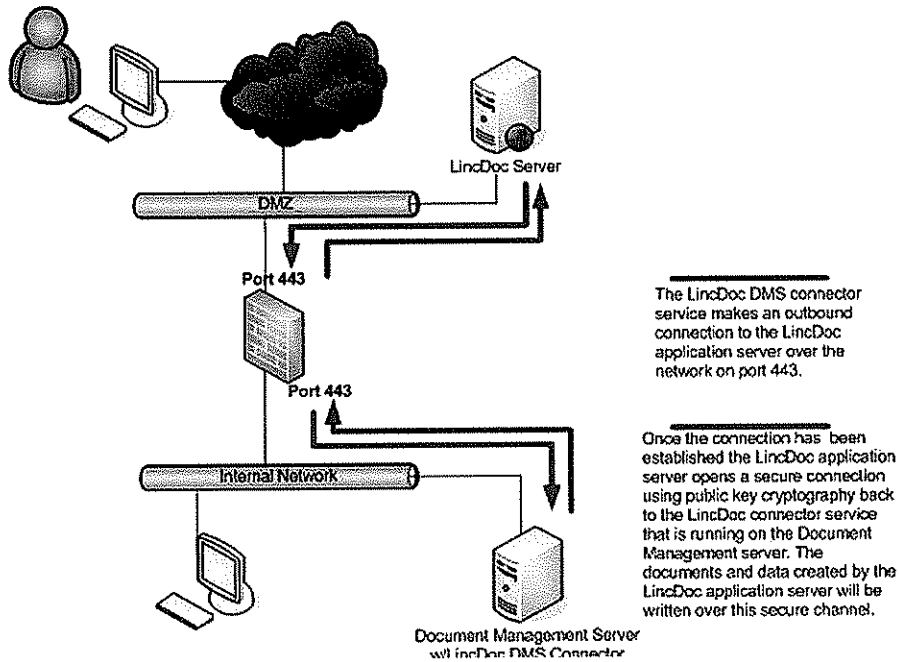


Figure 3.1.2.19a. LincDoc e-form solution with DMS – External. With this configuration the LincDoc application is located inside the DMZ, and outside the firewall.

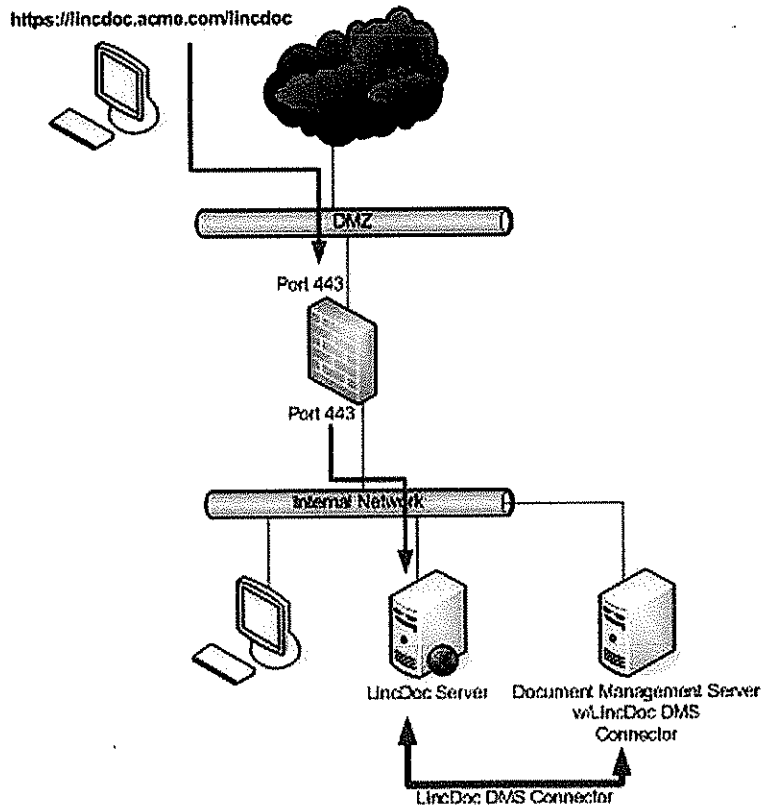


Figure 3.1.2.19b. LincDoc e-form solution with DMS - Internal. In this configuration the LincDoc server is situated inside your internal network. To facilitate internal access to the LincDoc server, port forwarding needs to be configured on your firewall. Port 80 or 443 (for SSL) needs to be opened up from the DMZ to the internal LincDoc server. Additionally there is a connector service installed on the DMS to facilitate the transfer of documents and/or data (again over secure channel).

Section III – Workflow Solution Section

- Laserfiche Workflow needs two pieces before users can interact with a workflow: a published workflow and starting rule. Once the workflow is designed in Workflow Designer, it must be published and stored in the Laserfiche Workflow database. In order to trigger the workflow, the starting condition must be saved in the Workflow Designer as well.

3.1.3.1 The Laserfiche Workflow rule-based application triggers workflows from any event that occurs in the Laserfiche database, such as the modification or creation of a new entry. As illustrated in Figure 3.1.3.1a, every Laserfiche function can be called by the Workflow application. Additionally, Laserfiche can run custom processes.

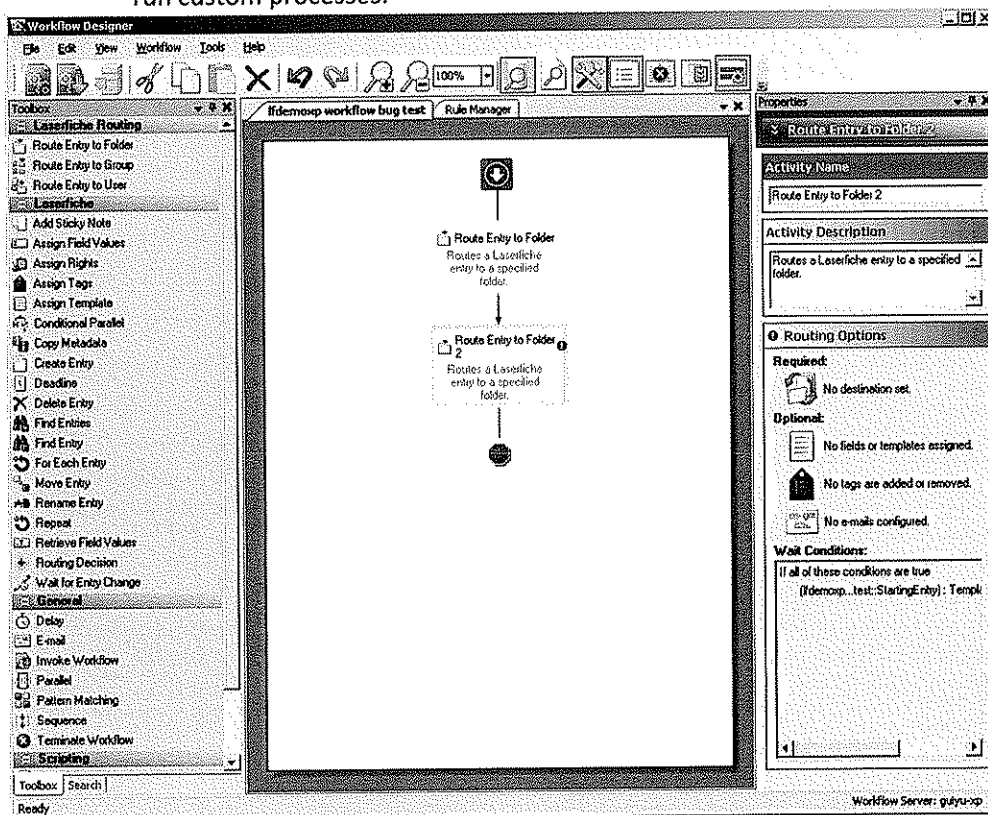


Figure 3.1.3.1a. Workflow Designer GUI. The Laserfiche Workflow Designer's GUI design allows users to create workflows by drag-and-drop into an intuitive flowchart.

- 3.1.3.2 Laserfiche can support more than 75 workflow participants. Any user with the appropriate rights can take part in a workflow. Once a workflow is designed and published to the Laserfiche Workflow database, it automatically interacts with all the Laserfiche users. For example, adding users to a workflow group (giving them access rights) allows those users to participate in the workflow processes.
- 3.1.3.3 The Laserfiche Workflow Designer application has a built-in interface that allows users to build and draw detailed flowcharts to model business processes. By using and understanding the Laserfiche Workflow Designer interface, business rules and processes are intuitively represented in the context of the document management process, as illustrated in Figure 3.1.3.3a.

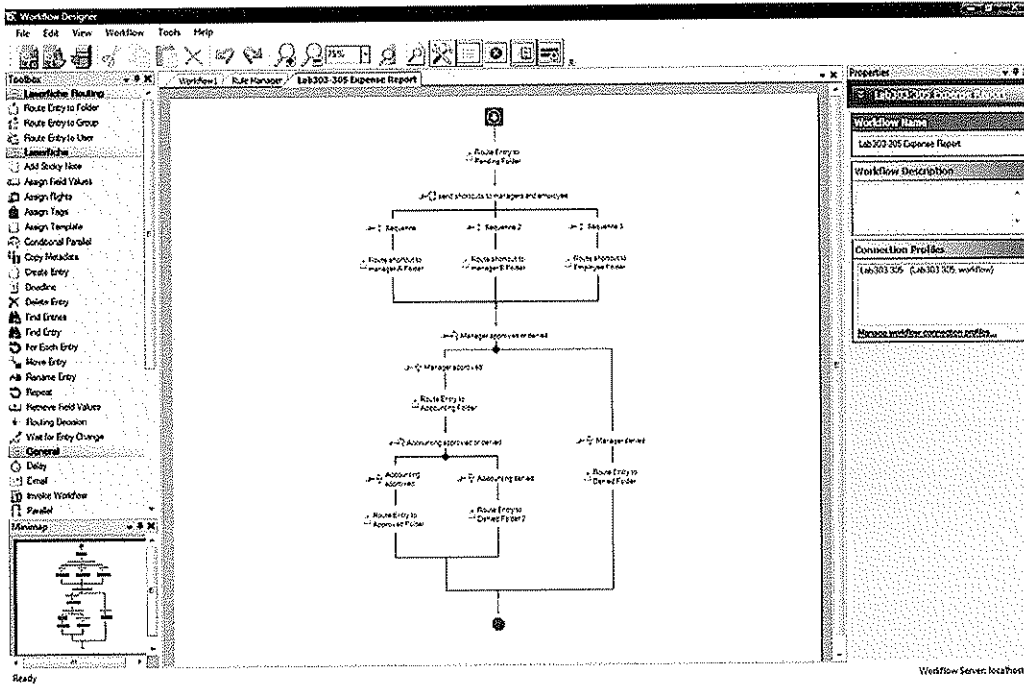


Figure 3.1.3.3a. Laserfiche Workflow Designer GUI Business Process Diagram. The strength of Laserfiche Workflow lies in its ability to allow visualization and to illustrate business processes intuitively while designing the actual workflow.

- 3.1.3.5 Workflows designed in Laserfiche take into account the users' security rights described in sections 3.1.1.6 (Feature Rights) and 3.1.1.31 (Entry Access Rights).
- 3.1.3.6 With the combination of index fields and waiting conditions, an entry containing the "on hold" status will not be eligible to be moved to the next stage of the workflow. Thus, other users can view on-hold documents and the reason for the document to be on-hold.
- 3.1.3.7 This subsection has been deleted.

Section IV – Vendor Qualifications

References



County of Los Angeles, Community Development Commission & Housing Authority

2 Coral Circle
Monterey Park, CA 91755

Project:	Enterprise Document Management System
Contact:	Rosa Chevarin, IS Manager, Housing Authority
Phone/Email:	(562)347-4663 / rosa.chevarin@laccdc.org
Size/Annual Budget	750 staff / \$430 Million FY2007-2008
Date of Project	August 2000 – Ongoing
Prime Consultant	Laserfiche Solutions Group
Description:	<p>The County of Los Angeles Community Development Commission (LACDC) in conjunction with the U.S. Department of Housing and Urban Development manages rental property for residents throughout the County of Los Angeles. The paperwork required to track these properties is immense. LACDC wanted a solution to minimize the paperwork generated throughout the life cycle of a subsidized rental agreement. Through an RFP process, LACDC chose Laserfiche as the document management and workflow software best suited to meet their challenges. LACDC employed the Laserfiche Solutions Group to analyze business processes in order to simplify their existing workflow. These workflow rules were created to push electronic documents through various approval processes to automate their day-to-day processes. Since implementing the Laserfiche workflow solution, the time to process paperwork has decreased dramatically and allowed the Commission to reduce costs in the process.</p>



City of Riverside, CA

3900 University Dr.
Riverside, CA 92522

Project: Enterprise Document Management System

Contact: Steve Reneker, CIO

Phone/Email: (951)826-5109 / sreneker@riversideca.gov

Size/Annual Budget 3,000 staff / \$1.1 Billion annual budget

Date of Project: October 1998 – Ongoing

Prime Consultant Laserfiche Solutions Group

Description: Departments using Laserfiche: Police, City Clerk, HR, Engineering, Finance, Public Utilities, Building & Safety
The Laserfiche solution at the City of Riverside is a great example of using integration to automatically configure and build a comprehensive content repository. Through integration with the Police Department's RMS system, case folders are automatically created and case documentation is automatically indexed and filed. Similarly, through integration with their digital recording system, audio files are automatically downloaded, indexed and filed. The end result is a system that stores and protects critical documents and audio files and provides secure access twenty-four hours a day / seven days a week.
<http://www.laserfiche.com/news/?s=riverside>



City of Anaheim, CA

200 S. Anaheim Blvd.
Anaheim, CA 92805

Enterprise Document Imaging Management System

Timeline:

August 2000 – Ongoing

Contact:

Ronald G. Smith, CRM, Records Manager,
Public Utilities

Phone/Email:

714-765-4159/ rgsmith@anaheim.net

Prime Consultant

Laserfiche Solutions Group

Description:

The Laserfiche solution at the City of Anaheim is a result of following the Project Management Methodology described in the Professional Services section of this proposal. The classification of documents, file plan, access control policy, retention management and disaster recovery plans all follow our best practices. The solution is used effectively throughout the city including the City Clerk, Finance, Public Utilities, Public Works, City Attorney's Office, Fire Department, and Human Resources.

The Laserfiche Solutions Group has been utilized to make other software solutions more effective through integration. Noteworthy projects include integration with the City's GIS system (ESRI ArcView) and permitting software (Tidemark).

<http://www.laserfiche.com/news/archives/2006/09/11/from-mishmash-to-huge-smash/>

Implementation Plan

Scope of Work

As outlined in the RFP, section 3.2 Scope of Work will be used to drive initial vendor rollout of the Enterprise Content Management System. By far, the largest items contained in the Scope of Work relate to workflow, 3.2.3 and 3.2.7.

3.2.3	Vendor will create and test multiple workflows for Licensing, and Limited Video Lottery Security.
3.2.7	Section 2 of the RFP functions to give each Bidder an idea of where the majority of documents flow through the Lottery as of the time of this publication and is for informational purposes only because the processes may change prior to the aware of the contract. SEE ATTACHMENT 5. The successful vendor must review the workflows prior to actual implementation to verify the workflow being utilized and recommend more efficient processes where inefficiencies exist.

The Laserfiche Solutions Group will fulfill the remaining items contained in the Scope of Work within the context of the workflows as outlined in above reference sections. This will make the tasks contained in the other sections more realistic when implemented as part of the workflow. Rollout of the Licensing and Limited Video Lottery Security workflows will follow the Laserfiche Solutions Group's standard methodology for implementation of large scale document imaging systems. At a high level, implementation will involve the following tasks in the provided sequence:

Planning

Planning begins with assembling the project teams where roles for each team member will be assigned as well as a general reporting structure. From there, a requirements analysis is performed, a critical first step to successfully completing a project on time and within budget. The requirements analysis involves the inspection of the documents that will be captured, the processes that will be automated and the way in which people will use and interact with the documents once they have been digitized. During the requirements analysis, important design factors such as security, access and retention requirements will be examined and documented. Once the analysis is complete, a summary report will be provided. The requirements analysis can then be used to drive development of the Detailed Project Work Plan where milestones, tasks, and resources are defined. Pre-project planning will usually identify communication plans between the client and the vendor as well as regular meetings for team members and project stakeholders to gauge overall project progress.

Hardware/Software Installation

Hardware and software required to support the solution as proposed by Laserfiche will be installed and configured in the West Virginia IT-designated environment.

Project Environment

The following hardware specifications utilize Dell products and components. The hardware has been recommended based on a projected scanning volume of 340,000 pages per year, submission of 40,000 electronic documents per year, and an existing document back log of 1.1 million images. There is a community of 200 users who may access the system at any given time.

The recommended hardware will also support the deployment of a web portal for information that is made available to the public.

Hardware is sized based on five years of growth and will accommodate rollout of Laserfiche outlined in the proposal response. The hardware is expected to scale to hundreds of concurrent users throughout the State. Maximum user concurrency is estimated at a very high 3:1 ratio and it is our expectation to easily support the 200 named users with the proposed hardware solution. Current volume estimates for five years in the range of 2-3 million objects. At an estimate average of 75KBs per object, total projected size of the repository after 5 years is on the order of 150GBs-225GBs.

Laserfiche is proposing hardware to meet the high-availability requirements mentioned in the RFP. There are 5 applications and 1 database that require installation on server class hardware. The Microsoft SQL Server will reside on its own database. Internal testing has shown an increase in performance when SQL Server is installed on a physical server as opposed to a virtual environment. Since the SQL Server is the workhorse of the proposed solution, it is justified to dedicate a separate box to the SQL Server.

The remaining 5 applications will be distributed in a virtual environment as follows; the Laserfiche Application Server and Laserfiche Workflow will each reside in their own virtual machine (VM1 & VM2) on a shared host. The web-based applications, Laserfiche Weblink/Web Access and Laserfiche Audit Trail Reporting will reside in their own virtual machine (VM3) as will the LincDoc eForms Server (VM4). VM3 and VM4 will share the same host.

High-availability is introduced with server virtualization as provided by VMWare. Each application is dedicated to a specific node but the virtualized applications can be failed over to any of the other remaining nodes using VMWare's High-Availability module. In this case, the servers will be required to have the same hardware and double the amount of capacity to accommodate potential failover of virtualized applications. This architecture will support failover of a single application node without degrading overall system performance.

Primary external storage for document images and database files will reside on the existing West Virginia Lottery Enterprise SAN. At a minimum, the SAN will be configurable to 3 separate RAID arrays. The 1st RAID array will be dedicated to storage of the Laserfiche images. It should be a RAID 5 with at least 225GBs of available storage. The 2nd RAID array will be for the Microsoft SQL transaction log in a RAID 1 configuration and a capacity of 30GBs. The 3rd RAID array will be for the Microsoft SQL data file in a RAID 1 configuration and a capacity of 20GBs. Please note that because of this storage requirement, the Laserfiche Application and SQL Servers will require host bus adapters proper to the current SAN environment.

Development and Training/UAT environments will be installed in separate virtual machines with the same specs as those outlined for the virtual machines being used in the production environment.

To support Disaster Recovery, the entire production infrastructure must be replicated at the remote site. Replication technologies supported by the SAN will be used to replicate the data from one location to the other. VMWare's High Availability module will be used to failover nodes from one location to another.

The backup server will be backing up data to a separate backup server. This backup server will be disk based but will have a tape drive to support disk-to-disk-to tape backup methodologies.

To meet the recommended grandfather-father-son backup strategy, 2TB of hard drive space is proposed. The backup server will also host VMWare's Virtual Infrastructure Server.

Workstations have been proposed primarily for scan stations and those slated to run the Laserfiche Quick Fields Forms processing suite. Dual 19" monitors are recommend allowing for easy access to the ECM system and other line of business applications (e.g., Outlook, etc.). LSG will work with West Virginia Lottery staff to configure two of these workstations with the scanners as specific below.

Product Name	Specs
SQL Server	2 Quad-Core Intel Xeon E5540 Processor (2.53 GHz, 1066MHz FSB), 36GBs RAM, RAID 1 146GBs, Microsoft Windows Server 2008 Standard x64, Microsoft SQL Server 2008 Standard
Laserfiche Application Server/ Laserfiche Workflow	2 Quad-Core Intel Xeon E5540 Processor (2.53 GHz, 1066MHz FSB), 12GBs RAM, RAID 1 146GBs, Microsoft Windows Server 2008 Standard x64, VMWare ESXi 4.0 Server
Laserfiche Web Access*/Audit Reporting/LincDoc	2 Quad-Core Intel Xeon E5540 Processor (2.53 GHz, 1066MHz FSB), 12GBs RAM, RAID 1 146GBs, Microsoft Windows Server 2008 Standard x64, VMWare ESXi 4.0 Server
Backup Server/VMWare Infrastructure	1 Quad-Core Intel Xeon E5520 Processor (2.26 GHz, 1066MHz FSB), 6GBs RAM, RAID 1 73GBs, Microsoft Windows Server 2008 Standard x64
DAS for Disk Based Backup	PowerVault MD1000 External Storage Array, SAS and SATA support
Tape Back-up Device	PowerVault 114T, LTO-3 Tape Rack Enclosure, 2 Drive
Development Environment	2 Quad-Core Intel Xeon E5540 Processor (2.53 GHz, 1066MHz FSB), 12GBs RAM, RAID 1 146GBs, Microsoft Windows Server 2008 Standard x64, VMWare ESXi 4.0 Server
Training/Test Environment	2 Quad-Core Intel Xeon E5540 Processor (2.53 GHz, 1066MHz FSB), 12GBs RAM, RAID 1 146GBs, Microsoft Windows Server 2008 Standard x64, VMWare ESXi 4.0 Server
Laserfiche Storage Tape Back-up Device Rack Mount Accessories Flat Panel Monitor, Keyboard, Mouse Keyboard/Monitor/Mouse Switch Box (8 Port/1U) 12" CPU-to-Switch Cable R3000 XR UPS (Low Voltage)	Existing West Virginia Lottery Enterprise SAN SCSI LTO-4 Ultrium 1840 Drive
<p>*Note that a single Web Access server has been specified as part of the solution. It is expected that as the system grows, additional web servers may need to be added. The proposed architecture makes adding web servers a fairly trivial task and Microsoft's Network Load Balancing can be used to load balance the web-based application. If the total number of web servers needs to be provided as part of the RFP, that information is available.</p>	
Desktops	
	Intel® Core™2 Duo E7200 processor (2.53 GHz, 3 MB L2 cache, 1066 MHz FSB) 4 GB 800 MHz DDR2 SDRAM 160 GB 7200 rpm SATA NCQ 19-inch LCD Monitor (recommended two per scan station)
Workstation	
Scanner	
Bowe Bell & Howell 9125 Ngenuity	Rated speed of 125 ppm or 250 ipm Ability to scan color, bi-tonal and grayscale 700 sheet automatic document feeder 600 DPI optical resolution

Bowe Bell & Howell Truper 3600 Plus	Unlimited daily duty cycle VRS Professional USB 2.0 interface and cable Rated speed of 67 ppm or ipm Ability to scan color and bi-tonal 200 sheet automatic document feeder 600 DPI optical resolution 10,000 page daily duty cycle VRS Professional
Canon DR2510C	USB 2.0 interface and cable Rated speed of 25 ppm or 50 ipm Ability to scan color and bi-tonal 50 sheet automatic document feeder 600 DPI optical resolution 1,500 page daily duty cycle USB 2.0 interface and cable

Business Continuity Planning

The process for avoiding service interruptions starts with an analysis of what downtime the client can manage. Laserfiche will work with WEST VIRGINIA IT staff to ensure maximum system availability and the ability to quickly recover from potential disasters, both natural and man made. From a systems perspective, downtime is addressed very early in the software development cycle. Each software release is put through a rigorous set of tests to ensure the greatest possible uptime.

The system is architected from a software and hardware standpoint to meet the high availability requirements of West Virginia Lottery. Laserfiche supports high availability by making use of existing server technologies and by its modular architecture. Existing technologies such as component redundancy and virtualized environments are used to protect the server based applications. Laserfiche’s modular architecture allows for separate processes such as the core application, database, workflow, and web logic to reside on different servers.

As outlined in the section on proposed hardware, high availability is introduced with server virtualization as provided by VMWare. A 2 node configuration is proposed whereby each application is dedicated to a specific node but the virtualized applications can be failed over to any of the other remaining nodes using VMWare’s high availability module. In this case, the servers will be required to have the same hardware and double the amount of capacity to accommodate potential failover of virtualized applications. This architecture will support failover of a single virtual machine without degrading overall system performance.

From a services standpoint, dedicated and backup Solutions Consultants are assigned to each client ensuring consistency of service and support should any problems arise. Part of his/her job description is to perform proactive monitoring of the system which gives us a better picture of its overall health. For particularly difficult issues, an escalation procedure is outlined for every client to make sure that any issues are resolved in the most efficient way possible.

Backup and Restore

A dedicated disk-based backup server is recommended as part of the overall solution. A combination of full and differential backups will be made throughout the week using industry



standard backup procedures. Total storage availability for daily production backups is estimated at one month for the first year of the system. The storage array can be scaled to meet the same one month online backup requirement when the system meets end of life after 5 years of growth. A full backup of all imaging data will be made once a week and rotated regularly to an offsite location to allow for disaster recovery. Offsite mirroring of data for immediate disaster recovery can be provided in a future phase of the solution.

Laserfiche File Plan Development

The foundation of the repository is based on a structured file plan that has been configured to manage information according to the rules dictated by the Licensing and Limited Video Lottery Security workflows. File folder hierarchies will be developed to support the various documents that will be routed to various users and departments throughout the repository. Document metadata will be developed based on requirements provided by West Virginia business analysts and the fields required for Workflow approval processes will be incorporated into the overall template design. Finally the proper security to folders and indexes will be put into place to ensure the proper access to all documents irrespective of their current location within any given workflow.

A separate file folder structure and corresponding indexing will be developed to demonstrate the DoD 5015.2 certified Records Management capabilities of the solution. The challenge of implementing an enterprise wide records management solution is that a structured, record series based repository is usually unintuitive and can be difficult for the average system user to navigate. Laserfiche provides the ability to create customized views of the repository based on the needs of individual divisions/departments, so they access a system that has the look and feel they prefer even though the documents are actually stored in a record series and managed according to retention schedule.

Furthermore, the proposed solution utilizes Laserfiche capture tools that can automatically classify and file documents in the appropriate record series and even make record folders, automating a historically time and labor intensive process. This strategy provides the ability to implement a DoD certified records management solution that provides the look and feel of a flexible, intuitive and customized document management solution.

Defining Capture Strategies

Capture strategies will focus on bringing documents into the system. For the Licensing and Limited Video Lottery Security workflows, this process will primarily involve the submission of documents from the on-line e-Forms system as provided by LincWare. LincWare's LincDoc is a document assembly and workflow system that gathers data entered by a user through a very intuitive web based interface. This data is entered by the user and/or extracted from any database that can be accessed via an SQL query or XML. Once entered, LincDoc then processes that data and applies preconfigured business logic which selects the right document(s) and/or paragraphs, inserts the data into the document and then presents the final version back to the user in a fully secured PDF document. Further processing may also include storing the accompanying document data back to a corporate database; automatic routing of the document to proper personnel; or archiving a copy of the PDF for audit purposes.

Other capture options outlined in the Scope of Work include the ability to scan documents from both standard desktop scanners and network scanners. Two desktop scanners will be configured

on the production capture workstations as provided by West Virginia IT. These scanned images are expected to go through document processing before they are committed to the database. Document processing can include OCR, ICR, or barcode recognition.

Since most network scanners can scan to network directories, Laserfiche Import Agent can be used to monitor those directories for the automatic import of documents. From there, documents can be sent into a workflow or processed by Laserfiche Quick Fields, the proposed forms processing suite. Quick Fields simplifies the organization and management of documents and unstructured information. It automates processing for a high volume of information by capturing data from various formats and sorting documents according to custom criteria, helping you put content to use quickly.

Finally, there is the ability to drag and drop documents directly into the Laserfiche repository. Laserfiche support the storage of all electronic file formats from Microsoft Office documents to sound and audio files. In the case of e-mails coming from the Microsoft Outlook client, metadata pertaining to the document such as To:, From:, Date, and Subject can be read from the e-mail and used to automatically index the e-mail. Attachments can be configured to be stored along with the original e-mail or as a completely separate document.

Licensing and Limited Video Lottery Security Workflow

Build out of the Licensing and Limited Video Lottery (LVL) Security workflows will follow the Attachment E diagrams as provided by the RFP.

West Virginia Lottery – License Division
Table Games Occupation License Application Workflow – Administrative Portion
Table Games Occupation License Application Workflow – Financial Review
Traditional Retailer License Application Workflow
Activating Approved Lottery Products for Retailer
Limited Video Lottery License Application Workflow
Racetrack License Application Workflow
Manufacturers License Application Workflow
Limited Video Lottery Service Technicians License Application Workflow
West Virginia Lottery
Limited Video Lottery Machine Maintenance Request Workflow
Limited Video Lottery Site Survey Workflow
Limited Video Lottery Machine Installation Workflow

The workflow platform included with Laserfiche Rio is built on the Windows Workflow Foundation and provides a scalable and customizable workflow solution that can be integrated



with other applications. The Laserfiche workflow solution includes an intuitive design application that mimics the look and feel of MS Visual Studio and provides workflow rules in a top down format with an obvious start and finish so rules are easy to test and troubleshoot. Workflow activities can be triggered by actions that occur within the system and, through integration, by actions that occur outside of the system. Activities can include document routing and notification as well as modifications to metadata and security profiles and sending notification to other systems. The design tool includes customized Laserfiche workflow events as well as general Windows Workflow Foundation events. Workflow events from other systems that support the Windows Workflow Foundation can be added to the Laserfiche Workflow Designer and Laserfiche workflow events can be added to the design tools of applications that utilize the Windows Workflow Foundation. Because the Windows Workflow Foundation is essentially an extension of the Visual Studio development platform, custom workflow activities can be created and the system can be integrated with most applications.

The system supports parallel and sequential routing, notification of routing or activity and can be configured to perform actions on documents, groups of documents or folders. Because workflow rules can be configured to take action based on document properties, the system can be configured as a proactive safety net for misfiled or unclassified documents coming into the system. Objects can be routed to groups or individuals and appear in their workspace regardless of where they're stored in the repository. This provides workflow participants with a simple work queue to monitor and work from instead of having to monitor various locations throughout the system. The workflow system provides flexible search and reporting tools that provide a visual representation of where things are in a workflow. The workflow tables in the DBMS can also be accessed by a third party reporting tool to generate real-time, web-based reports that provide process related statistics and identify productivity gains and/or bottlenecks. The general approach to the design and build of the Licensing and LVL Security workflows is to leverage as much out of the box Laserfiche Workflow functionality as possible. As outlined in the section on capture strategies, most of the workflows will be initiated by a web based form. The interactive form will be used to track document status throughout its lifecycle. At the end of its lifecycle, the document will be converted to a TIFF image for archival purposes.

In addition to leveraging out of the box functionality, certain similarities contained in the Licensing and LVL Security workflows will allow for the modular build out of workflow processes. Instead of designing single, monolithic workflows, workflows will actually consist of multiple smaller workflows that can be recycled and reused as needed. Some of these reusable processes include:

Fingerprinting Verification	A modular workflow that can be defined to manage the fingerprinting verification process
NCIC Background Checks	A modular workflow that can be defined to manage NCIC background checks
Credit Checks	A modular workflow that can be defined to manage credit checks
Check Disbursement	A modular workflow that can be defined to manage payment and the proper distribution of fees such as the case of a Racetrack Application
30, 60, 90, 180 Day Deadlines/Delay	Deadlines specify alternate routes for a document that can be defined based on a timeout period for inactivity. Similarly a delay activity can be called where a workflow definition or a particular

	portion of a definition can be delayed by a specified length of time.
Checklist	Certain workflow processes involve a set of documents that must be submitted in order to proceed to the next workflow step. For example, in the Table Games Occupation License Application Workflow, checklist functionality can be built into the workflow to electronically ensure that an application includes all required forms.

Due to the inherent complexity contained in some of the Licensing and Limited Video Lottery Security workflows, custom Windows Workflow Foundation activities or integration with 3rd party applications and databases may be required to meet the Lottery's requirements. Many of these custom activities will be used by multiple Licensing and LVL Security workflows so the same strategy to modularize workflow components will be employed here.

e-Forms	<p>e-Forms integration will be provided by LincWare's LincDoc product., a document assembly and workflow system that gathers data entered by a user through a very intuitive web based interface. This data is entered by the user and/or extracted from any database that can be accessed via an SQL query or XML.</p> <p>Once entered, LincDoc then processes that data and applies preconfigured business logic which selects the right document(s) and/or paragraphs, inserts the data into the document and then presents the final version back to the user in a fully secured PDF document.</p> <p>Further processing may also include storing the accompanying document data back to a corporate database; automatic routing of the document to proper personnel; or archiving a copy of the PDF for audit purposes.</p> <p>LincWare, through Laserfiche's Professional Developer's Program, has developed a connector that allows for the submission of LincDoc web-based forms directly into a Laserfiche repository for archival or workflow purposes.</p>
Digital Signatures	<p>CoSign[®] for Laserfiche adds digital signatures to the Laserfiche environment simply and intuitively, enabling electronic signing and sealing of documents within the Laserfiche repository and workflow. CoSign makes it easy to digitally sign transactions, documents and records by embedding the standard signature technology directly into mainstream business applications. CoSign produces a signature record for every signature it captures. This Portable Signature Format (CoSign PSF[™]) allows anyone to seamlessly verify and retain proof of identity, intent, and document integrity without costly, complicated, or proprietary software.</p> <p>The technology behind CoSign digital signatures is based on an industry standard Public Key Infrastructure (PKI). With PKI, each user has a key-pair, a Private Key, and a Public Key used in every signature. Documents can then be signed by a Public Key, stored</p>

	in Laserfiche and opened by a user with the corresponding Private Key. Alternatively, for documents requiring multiple signatures, workflow can route the document to users that can then sign a document with the correct public key.
3rd Party Database Updates	Many of the License and LVL Security workflows have workflow steps where external databases need to be updated or read from. The Laserfiche Solutions Group proposes a modular custom activity that allows for UPDATE-ing or SELECT-ing to or from SQL databases. For example, in the Site Survey workflow, there is currently a manual step where the Site Survey is photocopied and recorded in the LVL Security Site Survey database. This could be easily transformed into an electronic workflow where an e-mail is sent out to an individual notifying them of a completed Site Survey and automatically updating the LVL Security Site Survey database with the relevant information.
Generate Unique ID	Certain workflows may require the generation of a unique ID to apply to documents as they are routed throughout the workflow.
Auto-generation of Letters	Most of the workflows contain steps that require letters to be generated as part of the workflow such as a Denial letter. Generation of these letters can occur as part of a custom activity that essentially performs a mail merge between an electronic form (LincDoc, Word or PDF) and metadata associated to a particular documents workflow status. Please note that the custom activity will automatically create the letter but printing of the resulting letter will be managed by West Virginia Lottery staff.
Reporting	While the Attachment E workflows only mention two reports specifically, Table Games Permit Financials and Site Survey, it is assumed that West Virginia Lottery staff will need the ability to create custom reports as the system reaches a certain usage level. Laserfiche Solutions Group engineers will work with West Virginia Lottery IT staff to create up to five (5) custom reports using the Lottery's reporting software of choice.
Integration to EMC Centera	Laserfiche partners with 3 rd party storage vendor, Seven10 Storage, which provides a set of software drivers allowing Laserfiche to address the EMC Centera storage device. While the storage software is only one aspect of the solution, LSG will work provide the necessary knowledge and resources to Lottery staff to properly map Laserfiche DoD 5015.2 Records Management metadata to records retention schedules as managed by the EMC Centera storage device.

Training

Please see the section on Training Services

Testing

Hardware and Software Testing

Testing begins with the installation of the hardware and software. Hardware and software are put through a series of scripted tests that simulate anywhere from 2-4 times the expected production load. Additionally, tests are designed to simulate application recovery from hardware failures such as power outages and disk failures.

Unit Testing

Unit testing will focus on the individual components of the overall system.

Server	Workstation
Laserfiche Server	Core Client application
Web Server	Scanning
Workflow Server	Quick Fields
Backup	
LincDoc	

Application Testing

Application testing focuses on the overall application as outlined by the file plan. The file plan deals primarily with how the documents are stored, the metadata assigned to documents, and who has access to the documents. The processes used to get documents into the system such as scanning and forms processing are also addressed during application testing.

Test cases created in conjunction with West Virginia Lottery staff are tracked by the unique case id, a description of the test, the expected result, the actual test result, and whether the test is considered a pass or fail. All failed test cases pass through another testing cycle until the test case passes or is flagged for review due to a succession of failures.

Integration Testing

Integration testing will involve testing integration touch points between the document management system and external systems. Testing will focus on the integrations that contain the most complexity such as those involved in the Licensing and LVL Security workflows.

System Testing

System testing will tie all the individual components together and test how they interact with each other. A specific User Acceptance Testing plan will be developed along with West Virginia Lottery staff to describe procedures for formal testing of all aspects of the system and network components. .

Pilot Group

For most implementations, before the system is rolled out to the entire user community, pilot testing will be conducted using an appropriately diverse sample. During the pilot, usage patterns will be monitored to ensure the system will be used as predicted and that the system

components will support the usage. Usability feedback will be solicited and training requirements will be determined.

However, based on the requirements as outlined by the Scope of Work, the Pilot Group will consist of working with West Virginia Lottery staff to check off the items contained in the Scope of Work. Successful check off of the sections listed in the Scope of Work will signal completion of the initial setup project phase. It is assumed that West Virginia Lottery staff will take over management and further deployment of the ECM system with assistance from LSG staff.

Project Plan

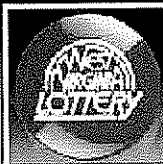
In the attached project plan, a kick off date of May 3rd, 2010 is slated. Please note that this kick off date, as well as any other dates listed in the project plan is variable and subject to change. The primary purpose behind the project plan is to give West Virginia Lottery a high level overview of how long LSG expects this project to take based on the requirements outlined in the Scope of Work section in the RFP.

The project begins with a planning phase where project teams are assembled, an initial set of requirements is gathered, and a detailed project work plan is created. There are two rounds of hardware installation, one for the Development/Test environment and one for Production. hardware for Dev/Test is configured and installed after the initial planning phase. Hardware for the Production environment is configured and installed in the November 2010 timeframe prior to the scheduled Pilot rollout in mid January 2011.

The core build out of the project will take place over three parallel tracks. Due to the number of workflows involved, Tracks A & B will have teams dedicated to designing the workflows. Instead of identifying specific workflows for each track, a certain amount of time has been allocated to the workflows based on LSG's experience with implementing workflows in the past. The West Virginia Lottery team can then identify workflows to be built based on their priorities. The workflow cycles for each track are as follows, two cycles of 6 weeks, two cycles of 5 weeks and two cycles of four weeks for a total of 30 weeks. The cycles are further broken down into sprints as outlined in the section on implementation methodology. Detail is given only for the first sprint since the remaining sprints contain a similar set of tasks.

Track C is dedicated to the customization/integration tasks. The five customizations are schedule to occur over a period of 13 weeks. The first three, Auto-generation of letters, 3rd-party Database Updates, and Generate Unique ID are developed early on in the project lifecycle so that they can be deployed in the subsequently developed workflows. Reporting and the Integration to EMC Centera are developed later on in the project lifecycle since they are not specifically required by all of the workflows.

Development of the core solution is scheduled to complete just before the winter holiday season. Testing of the entire system is extended longer than it would normally take to account for work schedules during the holidays. Pilot rollout, once testing is complete, is scheduled for January 17, 2011.



State of West Virginia Lottery
ECM Implementation
Project Plan



ID	Task Name	Duration	Start	Finish	Predecessor
1	Planning	132 days?	Mon 5/3/10	Tue 11/2/10	
2	Assemble Project Teams	2 days	Mon 5/3/10	Tue 5/4/10	
3	State of WV Lottery (Business)	2 days	Mon 5/3/10	Tue 5/4/10	
4	State of WV Lottery (IT)	2 days	Mon 5/3/10	Tue 5/4/10	
5	Laserfiche Solutions Group	2 days	Mon 5/3/10	Tue 5/4/10	
6	Local VAR	2 days	Mon 5/3/10	Tue 5/4/10	
7	Hardware Vendor (Scanners)	2 days	Mon 5/3/10	Tue 5/4/10	
8	Hardware Vendor (Other Hardware)	2 days	Mon 5/3/10	Tue 5/4/10	
9	Requirements Analysis	3 days?	Wed 5/5/10	Fri 5/7/10	
10	Confirm Architecture	2 days	Wed 5/5/10	Thu 5/6/10	
11	Confirm Software	2 days	Wed 5/5/10	Thu 5/6/10	
12	Confirm Hardware	2 days	Wed 5/5/10	Thu 5/6/10	
13	Confirm Deployment Environments	2 days	Wed 5/5/10	Thu 5/6/10	
14	Purchase Hardware	1 day?	Fri 5/7/10	Fri 5/7/10	13
15	Develop Detailed Project Work Plan	9 days	Mon 5/3/10	Thu 5/13/10	
16	Schedule Status and Milestones Meetings	9 days	Mon 5/3/10	Thu 5/13/10	
17	Finalize Project Work Plan	1 day?	Fri 5/14/10	Fri 5/14/10	15
18	Communication Management	117 days	Mon 5/24/10	Tue 11/2/10	
19	Develop Support Plan	1 day	Mon 5/24/10	Mon 5/24/10	
20	Define Escalation Path To Laserfiche Help Desk	1 day	Mon 5/24/10	Mon 5/24/10	46
21	Ongoing Support for WV Lottery	1 day	Mon 5/24/10	Mon 5/24/10	
22	Dedicated Laserfiche Systems Engineer	1 day	Mon 5/24/10	Mon 5/24/10	
23	Develop Communications Plan	2 days	Mon 11/1/10	Tue 11/2/10	183
24	Pre-Launch Notifications	2 days	Mon 11/1/10	Tue 11/2/10	
25	Ramp-up Messages	2 days	Mon 11/1/10	Tue 11/2/10	
26	Launch Notifications	2 days	Mon 11/1/10	Tue 11/2/10	
27	Rollout Campaign	2 days	Mon 11/1/10	Tue 11/2/10	
28	Post-Launch Notifications	2 days	Mon 11/1/10	Tue 11/2/10	
29	Maintain Communications (ensures user adoption)	2 days	Mon 11/1/10	Tue 11/2/10	
30	Training Project Teams	45 days	Mon 5/3/10	Fri 7/2/10	
31	Team Introductions and Communication Plan	1 day	Mon 5/3/10	Mon 5/3/10	
32	New Product Training	45 days	Mon 5/3/10	Fri 7/2/10	
33					
34	Hardware/Software Installation/Configuration	10 days	Mon 5/10/10	Fri 5/21/10	14
35	Build (Dev/Test)	7 days	Mon 5/10/10	Tue 5/18/10	
36	Laserfiche Application Server	7 days	Mon 5/10/10	Tue 5/18/10	
37	SQL Server	7 days	Mon 5/10/10	Tue 5/18/10	
38	Web Access Server	7 days	Mon 5/10/10	Tue 5/18/10	
39	Audit Trail	5 days	Mon 5/10/10	Fri 5/14/10	
41	Configure Kerberos	7 days	Mon 5/10/10	Tue 5/18/10	
42	Workflow Server	7 days	Mon 5/10/10	Tue 5/18/10	
43	Backup Server	7 days	Mon 5/10/10	Tue 5/18/10	
44	LinDoc Server	7 days	Mon 5/10/10	Tue 5/18/10	
45	CoSign	7 days	Mon 5/10/10	Tue 5/18/10	
46	Test	3 days	Wed 5/19/10	Fri 5/21/10	35
47					



State of West Virginia Lottery
ECM Implementation
Project Plan



ID	Task Name	Duration	Start	Finish	Preced
48	Hardware/Software Installation/Configuration	10 days?	Mon 11/1/10	Fri 11/12/10	183
49	Build (Prod)	7 days?	Mon 11/1/10	Tue 11/9/10	
50	Laserfiche Application Server	7 days	Mon 11/1/10	Tue 11/9/10	
51	SQL Server	7 days	Mon 11/1/10	Tue 11/9/10	
52	Web Access Server	7 days	Mon 11/1/10	Tue 11/9/10	
53	Audit Trail	5 days	Mon 11/1/10	Fri 11/5/10	
54	Configure Web Reports	5 days	Mon 11/1/10	Fri 11/5/10	
55	Configure Kerberos	7 days	Mon 11/1/10	Tue 11/9/10	
56	Workflow Server	7 days	Mon 11/1/10	Tue 11/9/10	
57	Backup Server	7 days	Mon 11/1/10	Tue 11/9/10	
58	LinDoc Server	7 days	Mon 11/1/10	Tue 11/9/10	
59	CoSign	7 days	Mon 11/1/10	Tue 11/9/10	
60	Client Workstations	1 day?	Mon 11/1/10	Mon 11/1/10	
61	Scan Stations	1 day?	Mon 11/1/10	Mon 11/1/10	
62	Test	3 days	Wed 11/10/10	Fri 11/12/10	49
63					
64	Track A (Workflow)	150 days?	Mon 5/24/10	Fri 12/17/10	46
65	Workflow 1	30 days?	Mon 5/24/10	Fri 7/2/10	
66	Sprint #1	5 days?	Mon 5/24/10	Fri 5/28/10	46
67	Requirements Gathering	1 day?	Mon 5/24/10	Mon 5/24/10	46
68	Fileplan	4 days	Mon 5/24/10	Thu 5/27/10	
69	Design	4 days	Mon 5/24/10	Thu 5/27/10	
70	Folder Hierarchies	4 days	Mon 5/24/10	Thu 5/27/10	
71	Folder/Documents Nomenclature	4 days	Mon 5/24/10	Thu 5/27/10	
72	Template Design	4 days	Mon 5/24/10	Thu 5/27/10	
73	Security	4 days	Mon 5/24/10	Thu 5/27/10	
74	User/Groups	4 days	Mon 5/24/10	Thu 5/27/10	
75	Object Access	4 days	Mon 5/24/10	Thu 5/27/10	
76	Template Template Access	4 days	Mon 5/24/10	Thu 5/27/10	
77	Records Retention Schedule	4 days	Mon 5/24/10	Thu 5/27/10	
78	Document Capture	4 days	Mon 5/24/10	Thu 5/27/10	
79	Design	4 days	Mon 5/24/10	Thu 5/27/10	
80	e-Forms	4 days	Mon 5/24/10	Thu 5/27/10	
81	Microsoft Templates of e-Forms	4 days	Mon 5/24/10	Thu 5/27/10	
82	Publish Process to webpage	4 days	Mon 5/24/10	Thu 5/27/10	
83	Barcode Requirements	4 days	Mon 5/24/10	Thu 5/27/10	
84	Metadata and Destination Folders	4 days	Mon 5/24/10	Thu 5/27/10	
85	Workflow Criteria	4 days	Mon 5/24/10	Thu 5/27/10	
86	Scanned Documents	4 days	Mon 5/24/10	Thu 5/27/10	
87	Configure Scanners	4 days	Mon 5/24/10	Thu 5/27/10	
88	Capture Process	4 days	Mon 5/24/10	Thu 5/27/10	
89	Forms Designer Training	4 days	Mon 5/24/10	Thu 5/27/10	
90	Workflow	4 days	Mon 5/24/10	Thu 5/27/10	
91	Design	4 days	Mon 5/24/10	Thu 5/27/10	
92	Build/Test	4 days	Mon 5/24/10	Thu 5/27/10	
93	Workflow Training	4 days	Mon 5/24/10	Thu 5/27/10	



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ID	Task Name	Duration	Start	Finish	Prech
94	Demo & Gather Feedback	1 day?	Fri 5/28/10	Fri 5/28/10	92
95	Sprint #2	5 days?	Mon 5/31/10	Fri 6/4/10	95
99	Sprint #3	5 days?	Mon 6/7/10	Fri 6/11/10	95
103	Sprint #4	5 days?	Mon 6/14/10	Fri 6/18/10	99
107	Sprint #5	5 days?	Mon 6/21/10	Fri 6/25/10	103
111	Sprint #6	5 days?	Mon 6/28/10	Fri 7/2/10	107
115	Workflow II	30 days?	Mon 7/5/10	Fri 8/13/10	
116	Sprint #7	5 days?	Mon 7/5/10	Fri 7/9/10	111
120	Sprint #8	5 days?	Mon 7/12/10	Fri 7/16/10	116
124	Sprint #9	5 days?	Mon 7/19/10	Fri 7/23/10	120
128	Sprint #10	5 days?	Mon 7/26/10	Fri 7/30/10	124
132	Sprint #11	5 days?	Mon 8/2/10	Fri 8/6/10	128
136	Sprint #12	5 days?	Mon 8/9/10	Fri 8/13/10	132
140	Workflow III	25 days?	Mon 8/16/10	Fri 9/17/10	
141	Sprint #13	5 days?	Mon 8/16/10	Fri 8/20/10	136
145	Sprint #14	5 days?	Mon 8/23/10	Fri 8/27/10	141
149	Sprint #15	5 days?	Mon 8/30/10	Fri 9/3/10	145
153	Sprint #16	5 days?	Mon 9/6/10	Fri 9/10/10	149
157	Sprint #17	5 days?	Mon 9/13/10	Fri 9/17/10	153
161	Workflow IV	25 days?	Mon 9/20/10	Fri 10/22/10	
162	Sprint #18	5 days?	Mon 9/20/10	Fri 9/24/10	157
166	Sprint #19	5 days?	Mon 9/27/10	Fri 10/1/10	162
170	Sprint #20	5 days?	Mon 10/4/10	Fri 10/8/10	166
174	Sprint #21	5 days?	Mon 10/11/10	Fri 10/15/10	170
178	Sprint #22	5 days?	Mon 10/18/10	Fri 10/22/10	174
182	Workflow V	20 days?	Mon 10/25/10	Fri 11/19/10	
183	Sprint #23	5 days?	Mon 10/25/10	Fri 10/29/10	178
187	Sprint #24	5 days?	Mon 11/1/10	Fri 11/5/10	183
191	Sprint #25	5 days?	Mon 11/8/10	Fri 11/12/10	187
195	Sprint #26	5 days?	Mon 11/15/10	Fri 11/19/10	191
199	Workflow VI	20 days?	Mon 11/22/10	Fri 12/17/10	
200	Sprint #27	5 days?	Mon 11/22/10	Fri 11/26/10	195
204	Sprint #28	5 days?	Mon 11/29/10	Fri 12/3/10	200
208	Sprint #29	5 days?	Mon 12/6/10	Fri 12/10/10	204
212	Sprint #30	5 days?	Mon 12/13/10	Fri 12/17/10	208
216					
217	Track B (Workflow)	130 days?	Mon 5/24/10	Fri 11/19/10	46
218	Workflow I	30 days?	Mon 5/24/10	Fri 7/2/10	46
219	Sprint #1	5 days?	Mon 5/24/10	Fri 5/28/10	46
248	Sprint #2	5 days?	Mon 5/31/10	Fri 6/4/10	219
252	Sprint #3	5 days?	Mon 6/7/10	Fri 6/11/10	248
256	Sprint #4	5 days?	Mon 6/14/10	Fri 6/18/10	252
260	Sprint #5	5 days?	Mon 6/21/10	Fri 6/25/10	256
264	Sprint #6	5 days?	Mon 6/28/10	Fri 7/2/10	260
268	Workflow II	30 days?	Mon 7/5/10	Fri 8/13/10	
269	Sprint #7	5 days?	Mon 7/5/10	Fri 7/9/10	264



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Laserfiche
Solutions Group

ID	Task Name	Duration	Start	Finish	Predecessor
273	Sprint #8	5 days?	Mon 7/12/10	Fri 7/16/10	269
277	Sprint #9	5 days?	Mon 7/19/10	Fri 7/23/10	273
281	Sprint #10	5 days?	Mon 7/26/10	Fri 7/30/10	277
285	Sprint #11	5 days?	Mon 8/2/10	Fri 8/6/10	281
289	Sprint #12	5 days?	Mon 8/9/10	Fri 8/13/10	285
293	Workflow III	25 days?	Mon 8/16/10	Fri 9/17/10	
294	Sprint #13	5 days?	Mon 8/16/10	Fri 8/20/10	289
298	Sprint #14	5 days?	Mon 8/23/10	Fri 8/27/10	294
302	Sprint #15	5 days?	Mon 8/30/10	Fri 9/3/10	298
306	Sprint #16	5 days?	Mon 9/6/10	Fri 9/10/10	302
310	Sprint #17	5 days?	Mon 9/13/10	Fri 9/17/10	306
314	Workflow IV	25 days?	Mon 9/20/10	Fri 10/22/10	
315	Sprint #18	5 days?	Mon 9/20/10	Fri 9/24/10	310
319	Sprint #19	5 days?	Mon 9/27/10	Fri 10/1/10	315
323	Sprint #20	5 days?	Mon 10/4/10	Fri 10/8/10	319
327	Sprint #21	5 days?	Mon 10/11/10	Fri 10/15/10	323
331	Sprint #22	5 days?	Mon 10/18/10	Fri 10/22/10	327
335	Workflow V	20 days?	Mon 10/25/10	Fri 11/19/10	
336	Sprint #23	5 days?	Mon 10/25/10	Fri 10/29/10	331
340	Sprint #24	5 days?	Mon 11/1/10	Fri 11/5/10	336
344	Sprint #25	5 days?	Mon 11/8/10	Fri 11/12/10	340
348	Sprint #26	5 days?	Mon 11/15/10	Fri 11/19/10	344
352					
353	Track C (Customization)	130 days?	Mon 5/10/10	Fri 11/5/10	14
354	Auto-generation of Letters	20 days?	Mon 5/10/10	Fri 6/4/10	
355	Sprint #1	5 days?	Mon 5/10/10	Fri 5/14/10	
360	Sprint #2	5 days?	Mon 5/17/10	Fri 5/21/10	355
364	Sprint #3	5 days?	Mon 5/24/10	Fri 5/28/10	360
368	Sprint #4	5 days?	Mon 5/31/10	Fri 6/4/10	364
372	3rd-party Database Updates	20 days?	Mon 5/10/10	Fri 6/4/10	
373	Sprint #1	5 days?	Mon 5/10/10	Fri 5/14/10	
377	Sprint #2	5 days?	Mon 5/17/10	Fri 5/21/10	373
381	Sprint #3	5 days?	Mon 5/24/10	Fri 5/28/10	377
385	Sprint #4	5 days?	Mon 5/31/10	Fri 6/4/10	381
389	Generate Unique ID	10 days?	Mon 6/7/10	Fri 6/18/10	
390	Sprint #5	5 days?	Mon 6/7/10	Fri 6/11/10	385
394	Sprint #6	5 days?	Mon 6/14/10	Fri 6/18/10	390
398	Reporting	15 days?	Mon 9/20/10	Fri 10/8/10	
399	Sprint #18	5 days?	Mon 9/20/10	Fri 9/24/10	310
403	Sprint #19	5 days?	Mon 9/27/10	Fri 10/1/10	399
407	Sprint #20	5 days?	Mon 10/4/10	Fri 10/8/10	403
411	Integration to EMC Centara	20 days?	Mon 10/11/10	Fri 11/5/10	
412	Sprint #21	5 days?	Mon 10/11/10	Fri 10/15/10	407
416	Sprint #22	5 days?	Mon 10/18/10	Fri 10/22/10	412
420	Sprint #23	5 days?	Mon 10/25/10	Fri 10/29/10	416
424	Sprint #24	5 days?	Mon 11/1/10	Fri 11/5/10	420



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ID		Task Name	Duration	Start	Finish	Predecessor
428						
429		Testing	20 days	Mon 12/20/10	Fri 1/14/11	
430		Overall System Architecture Testing	15 days	Mon 12/20/10	Fri 1/7/11	212
431		User Acceptance Testing	15 days	Mon 12/20/10	Fri 1/7/11	212
432		System Documentation	5 days	Mon 1/10/11	Fri 1/14/11	431
433						
434		Rollout	10 days	Mon 1/17/11	Fri 1/28/11	429
435		Pilot	10 days	Mon 1/17/11	Fri 1/28/11	
436		End User Training	10 days	Mon 1/17/11	Fri 1/28/11	
437		System Administrator Training	2 days	Mon 1/17/11	Tue 1/18/11	
438		Regression Testing	5 days	Mon 1/17/11	Fri 1/21/11	
439		Pilot Project Signoff	1 day?	Mon 1/24/11	Mon 1/24/11	436

Project Management Overview

As a project based firm, the Laserfiche Solutions Group understands that our reputation is based on the impression we leave with our clients at the end of each project engagement. With this understanding, we have uncovered better ways of implementing projects by doing it and helping others do it. Through this work, we have come to value the Agile project management framework that emphasizes individuals and interactions, customer collaboration, and responding to change. Combining this framework with our people and expertise supports our ability to mitigate project risks and achieve our client objectives.

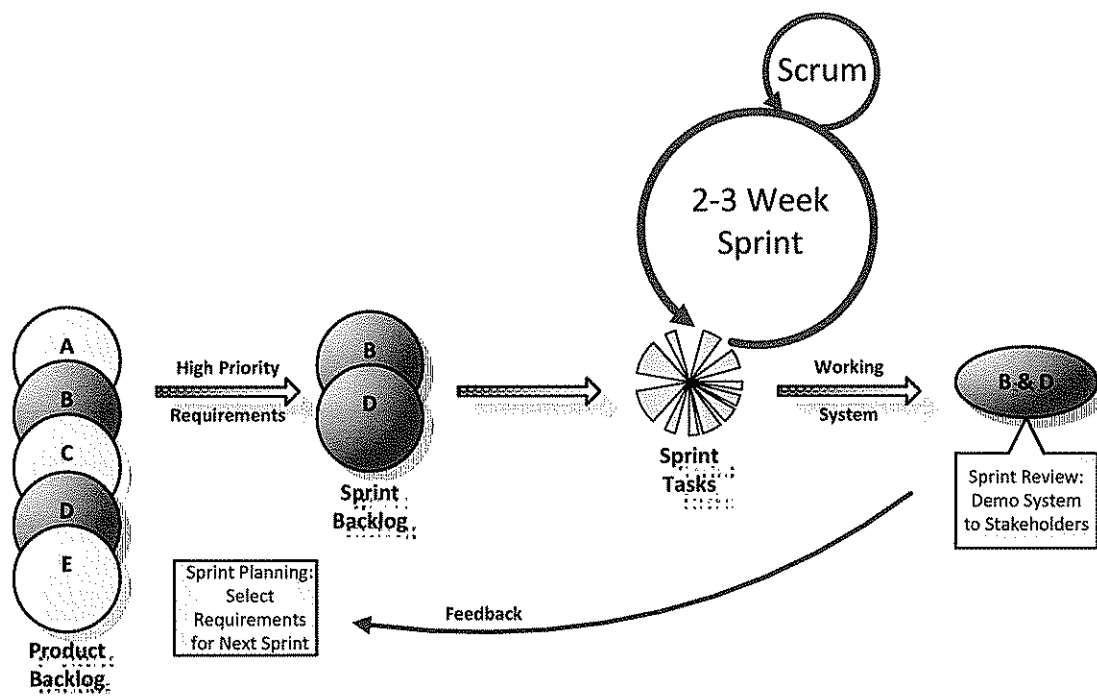
The Agile project management framework, commonly referred to as Scrum, provides guidelines and standards related to the areas of project planning, risk/issue management, communications management, project controls, and closeout. In addition to project management procedures, LSG has internal project management tools and templates to support our Product Owners with their day-to-day project management activities.

The sections that follow describe LSG's project management methodology, the framework upon which it was built, the project resources that contribute to its success, and a detailed description of the approach our Product Owners use when managing LSG client engagements. In addition, recommendations are given to LSG clients that can maximize the overall efficiency in which a project is implemented.

Project Management Methodology

LSG has created its own project management methodology based on the Agile framework (Scrum) originally developed to reduce the cost of change throughout the software development process. Scrum allows project stakeholders to ensure an effective and efficient attainment of project goals through a focus on quality management. The move toward Scrum is driven by an increasing number of larger, more complex projects that involve managing distributed project teams, new technologies, and business processes tied to controlling costs. The need to mitigate risk is a requirement as these projects grow in size and scope.

Using the Agile framework, we have defined processes, established roles, and formalized procedures that have been successfully used by project management staff to manage client engagements from initiation to project closeout. LSG has also set in place internal project management support functions. Our Research and Development team provides support in the areas of project management development, support, and project controls. Laserfiche project management teams also receive support from management throughout the project's lifecycle. Projects are reviewed on a weekly basis by both project management and account management staff to assess overall progress of the project.



Agile Project Lifecycle

Project Management Approach

Project Management is an iterative process. The Scrum approach emphasizes delivering business value every iteration and in order of business priority. Since every iteration is a static period of time [the “time box”] consisting of two to three weeks, it facilitates solicitation and response to business feedback at each delivery. From there, it is possible to measure what remains to be done and to make informed decisions on a constant and regular basis.

Scrum increases client involvement in the project management process by allowing the client to change and create requirements during each iteration. This feedback ensures that the most important client functionality is built and that only client requested functionality is built. Since new functionality is achieved at every iteration, the client can choose to use and test already built functionality at any time. Projects that are stopped because of unforeseen circumstances can still deliver the value created up until that time, maximizing the return on investment from the project.

Scrum projects are managed by a Product Owner and a Scrum Master. The Product Owner works with the client to define features of the product and decides on release dates and required content. The Scrum Master manages the day to day activities of the Scrum by helping to resolve impediments to the project and ensuring that the team is fully functional and productive.

LSG develops a customized implementation program for every project they are contracted to complete. However, the methodology used during every implementation is based on the process described below. Not all projects require such formal planning, documentation and reporting, but it’s important to understand the processes through which LSG develops and delivers all solutions.

Requirements Analysis – Gather and confirm initial set of requirements for a successful implementation.

Performing thorough requirements analysis is a critical first step to successfully completing a project on time and within budget. The requirements analysis involves the inspection of the documents that will be captured, the processes that will be automated and the way in which people will use and interact with the documents once they have been digitized. During the requirements analysis, important design factors such as security, access and retention requirements will be examined and documented. Once the analysis is complete, a summary report will be provided.

Confirm Architecture	In most cases, the architecture of the proposed solution was developed using whatever information was available. Once the requirements analysis is completed, it's necessary to confirm that the proposed architecture is appropriate. If any modifications are required, they will be documented along with the reasons for the modifications in the summary report.
Confirm Software	Using the information from the requirements analysis, it's important to confirm that the proposed software solution is appropriately configured and licensed. Any required addition (or removal) of applications or licenses will be documented in the summary report.
Confirm Hardware	Information about document types, expected performance, user behavior patterns, retention schedules and expected capture volumes can greatly affect the way a hardware solution is designed. Once the requirements analysis has been completed, it's necessary to confirm that the appropriate hardware configuration has been proposed. Any modification to the hardware solution will be documented in the summary report.

Planning – Define the backlog, checkpoints and milestones for the project

The Project Backlog will serve as the master list of items by which progress will be measured. The backlog will include all project related tasks as well as all required resources. The published backlog will also be used to track all project related activities and generate scheduled and ad hoc progress reports. No work on the project will begin until a mutually accepted Project Backlog has been developed.

Assemble Project Teams	The backlog will include the human resources required to complete the project. In most cases, members from each department and IT are included as well as project management oversight from both the client and Laserfiche teams. Roles for each team member will be assigned as well as a general reporting structure.
Develop Detailed Project Work Plan	Based on the information gathered as part of the requirements analysis, the Product Owner develops a set of use case scenarios (User Stories) that are then used to drive development of the Project Backlog. The overall project is logically separated into distinct two to three week time boxes corresponding to the sprints. Milestones are based on functionality developed during each sprint. Tasks will be chosen by the appropriate team member in order to clearly define responsibility.
Schedule Status and Milestones Meetings	Regular status meetings are necessary to ensure milestones are met and the project is completed on time. Scrum processes specify daily meetings among team members to update the team on their assigned tasks. Sprint Review meetings are for Business Owners and Product Owners to view demonstrations of currently available functionality at the end of each sprint. When meeting in person is not practical, we will host them using our web conferencing infrastructure.
Develop Communications Plan	In addition to scheduled status and milestone meetings, regular communication between project members may be necessary. Additionally, it may be important to provide reports or documentation to management as the project progresses. It is also important to document the content and decisions made during meetings for distribution in case team members aren't able to attend.

Scrum – Design and build the solution

While the Scrum process is initiated early on in the project lifecycle, it is primarily used as a vehicle to drive the iterative, time boxed development of the solution. Scrum celebrates the efforts of team driven development and the ability to gather constant feedback from the client to help move the project to its eventual completion.

Sprint Planning	The Sprint is the time boxed iteration that stands at the heart of the scrum process. Each sprint lasts two to three weeks and begins with a sprint planning meeting. The sprint planning meeting is used for the Product Owner and the Team to agree on a subset of the Product Backlog to work on this Sprint. The Product Backlog is a list of User Stories that the Product Owner and the Team mutually agree on to be completed during the sprint. The result is the Sprint Backlog, which is essentially a contract between the Product Owner and the Team to complete the agreed upon tasks contained in the Backlog.
Scrum	The Scrum is a daily 10-15 minute meeting between the Product Owner and the Team that is managed by the Scrum Master. Its primary purpose is for the Team to present what tasks are currently being worked on or complete, what they plan to work on, and most importantly, what tasks are being impeded. Impeded tasks can then be addressed by the Scrum Master to unblock them or to escalate their status to internal management staff for further review.

<i>Sprint Review</i>	The Sprint review is the end result of the Sprint. The Team takes this opportunity to show to the Product Owner and other business stakeholders (especially the customer!), new functionality developed as part of the current sprint. The Product Owner and the Team can then negotiate new user stories that are to be included in the next sprint planning meeting.
Test – Test the application for functionality, performance and design according to the specification	
Before the solution is rolled out, comprehensive testing will be done. It is important to identify issues through testing so that productivity is not hindered once the system goes live.	
<i>Unit and System Testing</i>	The proposed solution is made up of individual components that must be installed and tested within their environments. Implementation of a software or hardware component is not complete until it has been thoroughly tested. With Scrum, unit and system testing is performed throughout the project lifecycle. Acceptance criteria for testing are a product of the negotiation between the Scrum Team and Product Owner.
<i>Overall System Architecture Test</i>	The overall system will be tested to ensure the individual components work together as planned and tested according to the way in which it will be utilized. Functions such as scanning, data extraction, exporting and document routing will be tested to ensure they are working as expected. Hardware components will be tested to ensure image quality is acceptable and all devices can communicate with each other.
<i>Load Testing</i>	Once it's been determined that the system works as designed, load testing will be conducted to ensure it will provide expected performance once it's in production. Network bandwidth and server I/O will be tested under loads to ensure things like scanning at peak capacity won't affect search and retrieval.
Revise – Revise the application per testing results and conform to design specification	
Based on test results, there may be functional or performance issues that require modifications to hardware or software components to address. System modifications will require the approval of an appended specification before they will be made.	
<i>Revise Program</i>	Revisions will be made according to the appended system specification. New hardware or software components will be tested individually to ensure they function as anticipated. Since testing is performed during each sprint iteration, revision is also performed on a regular basis. With scrum, the client also becomes actively involved in the revision process as it is their feedback during the sprint reviews that drive changes in system functionality or the addition of new features.
<i>Regression Testing</i>	Regression testing will be conducted to ensure that modifications don't adversely affect system components that originally worked as anticipated.
Rollout – Launch the application, supported with communication, training and service	
Once the Design, Build, and Test phases of the project are complete, Scrum can be used to drive rollout of the system to the client and their end-users. The same Scrum infrastructure can be used to manage all rollout activities, such as pilot testing, change management activities and training to ensure a smooth transition to the new system.	

Pilot Group	Before the system is rolled out to the entire user community, pilot testing will be conducted using an appropriately diverse sample. During the pilot, usage patterns will be monitored to ensure the system will be used as predicted and that the system components will support the usage. Usability feedback will be solicited and training requirements will be determined.
Communication Plan	A plan will be developed and agreed upon that describes the way project related activities will be communicated to the user community. It's also important to develop a way for system users to communicate with the appropriate project team members.
Pre-Launch Notifications	If the system launch affects the way people will do their jobs (such as day forward scanning or workflow requirements), it's critical to give proper notification of what will be expected and when the system will be launched. Pre-launch notifications can also act as effective change management activities, providing a forum for users to discuss any potential questions or hesitations.
Launch Notifications	Launch notifications serve as formal notice of system rollout and what is expected of system users.
Post-Launch Notifications	Post-launch notifications serve to keep the user community abreast of accomplishments, changes and any system related issues that may affect them.
Training	<p>Providing proper training is critical to the success of the implementation. In most cases, training is provided onsite, in groups according to role/function and using a copy of the production system.</p> <p>End user training is hands on and conducted in groups using a replica of the production system. Whenever possible, users are grouped according to their role or function so that training can be targeted. In most cases follow up training sessions are scheduled to ensure questions that come up after initial use are addressed right away.</p> <p>The system administrator(s) is encouraged to participate in as much of the implementation process as possible so they understand how the hardware and software components are configured and work together. System administrator training will cover the overall design of the solution as well as the way individual components work. Topics covered include security configuration, troubleshooting and maintenance. Particular attention is paid to regular maintenance procedures to ensure the system continues to perform as expected.</p>
Support	LSG offers a variety of support options based on project complexity, required uptime and response expectations. Support plans range from telephone and email support to regularly scheduled maintenance visits and remote system monitoring.
Define Internal Escalation Path	The way in which problems are reported, addressed and escalated will be documented. Internal support personnel may be expected and trained to address common issues (such as ensuring hardware is properly connected, resetting passwords, etc.). Internal support staff will be given system documentation and access to an online knowledge base to assist them.
Project Wrap-Up	Once all of the milestones on the work plan are achieved, the implementation is considered complete. Project wrap-up activities may include formal sign-off and a final status meeting.
Publish Project Audit	If included in the work plan, a project audit will be published outlining the project goals, issues faces and final outcome of the implementation.

There are three key knowledge management areas defined by the Project Management Body of Knowledge (PMBOK) that are deserving of special attention and how they are managed by the Scrum process.

Change Control

Instituting change frequently has implications on what people do, what skills are required, and how people think about their work. If these changes are not planned and managed, the organization can waste time, money and people, experience low morale, miss opportunities, and can even experience failure.

Change management is a systematic process that enables the organization to achieve desired business results and sustains those results over time. It is frequently thought of as the “how to” of effective strategy implementation. Successful management of change needs to be integrated into implementation/training plans, not viewed as a separate project or initiative. As important, change management needs to be driven by the management team and thrust throughout the entire environment, not delegated.

The implementation of any application has a major impact on the business process, culture and the way in which the client operates. To this end, employee attitudes affect how the system is viewed and utilized. The most critical component to the success of the project is how well the change is managed. There are several factors that contribute to how well the system is embraced by the user community:

- The development of a high level vision of how client wants to manage the new processes
- Development of Guiding Principles for Change to provide a framework for the change
- The client’s readiness to accept the change
- A communication plan detailing the goals, vision, changes, etc.
- Clarity about processes and procedures, or where to go for more information
- Clarity regarding individual roles and responsibilities

Our Approach to Managing Organization Change

A change readiness assessment and a change management plan are the two key elements to effectively managing the change that the client will experience from any application implementation.

A change readiness assessment helps the client assess how prepared its employees are to accept the changes and identify key areas of focus during the planning process. The assessment enables us to create a plan, which minimizes the resistance within the current environment. Resistance is a natural part of a change and should be expected. However, if not managed well, it can affect the desired results. People should feel that they have a way to channel their concerns and be heard.

The change management plan addresses the level of work required to get the user community ready for the impending system implementation. We work with the client executive and middle management team to define the high level view of how client's new services will be delivered in the future. We identify leaders within the changing environment that understand and welcome the change and teach them how to organize a transition team. These individuals help bring about all the necessary conditions for the change and ensure that the reasons for the change are adequately communicated. Additionally, change agents selected from the user organization will help others to adopt the change based on their knowledge and comfort level of the technology.

We use a change readiness survey and facilitate the development of a transition plan. The transition plan identifies key communication strategies, training needs and incentives needed to make the transition a success.

A key part of the transition plan is to address the following for the various "stakeholders" in the process:

- Why are we changing? Why are we doing this now?
- Why is this important?
- What is the desired state (end of the implementation) going to look like?
- What will be the same as it is now? What will be different?
- How will we get to the desired state (time frame, approach)?
- What benefits will be achieved once the system is implemented?
- What will be the principles that should guide our team while we make the detailed changes in our operating environment?
- What is going to be my role/responsibility?
- Where & who do I call if I need help? Will there be training?

In Scrum, the change control process is streamlined and integrated into the daily Sprint routine. The Product Backlog is essentially managed by the client in conjunction with the Product Owner who is ultimately responsible for maintaining the list of items to be worked. It should be emphasized that the features providing the most business value to the client are ranked highest. At the end of each iteration, the features that were developed are demonstrated, and feedback that may affect future decisions about the items in the backlog and ranking is gathered from stakeholders. Process changes can then be analyzed, allowing the team to make course corrections not only in the project, but also in the way they work. Since the Sprint occurs on a regular basis, review of potential process changes also happens on a regular basis. Changes request are tracked using LSG's standard Software Services Request Document.

Instructions for the Responder: Send all feedback regarding document to [insert contact here]

Overview			
System:		Subsystem:	
Job #:	Date:	New or Change:	
Scope of Work:			
Estimated Time			

Tasks	Time (hours):	Notes
Fact Finding		
Systems Analysis		
Program Coding		
Testing		
Installation		
Training		
Documentation		
Software Support		
Project Management		
Cost:	\$	

Notes

Approval	
Client: _____	LSG Project Manager: _____
Work Order/Purchase Order #: _____	Cost: _____

Risk Management

The framework of the scrum process makes risk management an intrinsic part of the project lifecycle. Continuously identifying, analyzing, monitoring, and responding to risk triggers and risk events are part of the Scrum team’s iterative planning discussions. Daily Scrums, Sprint Planning, and Sprint Review meetings are all venues for risk management on an agile project. The key difference is that in the Scrum environment the entire team gets to participate in developing options and actions to reduce threats, a task that is conducted with more frequency than is common in traditional plan-driven projects. The team owns risk management in projects managed by Scrum. The Scrum Product Owner facilitates the process and makes the results visible to the entire Team.

Quality

Scrum brings Quality Control and testing back into the process as opposed to the end of the process. Since each sprint iteration potentially produces a product with an expanded feature set, Quality Control is heavily involved throughout the life cycle of the project. Regular review of the project also promotes the concept of continuous improvement which the Scrum principles of constant feedback and responding to change support. Continuous improvement is practiced in Sprint Planning meetings, the Sprint Review, and daily Scrums.

Client Engagement

One of the principles of Agile Development is, “The most efficient and effective method of conveying information to and within a development team is a conversation.” LSG values

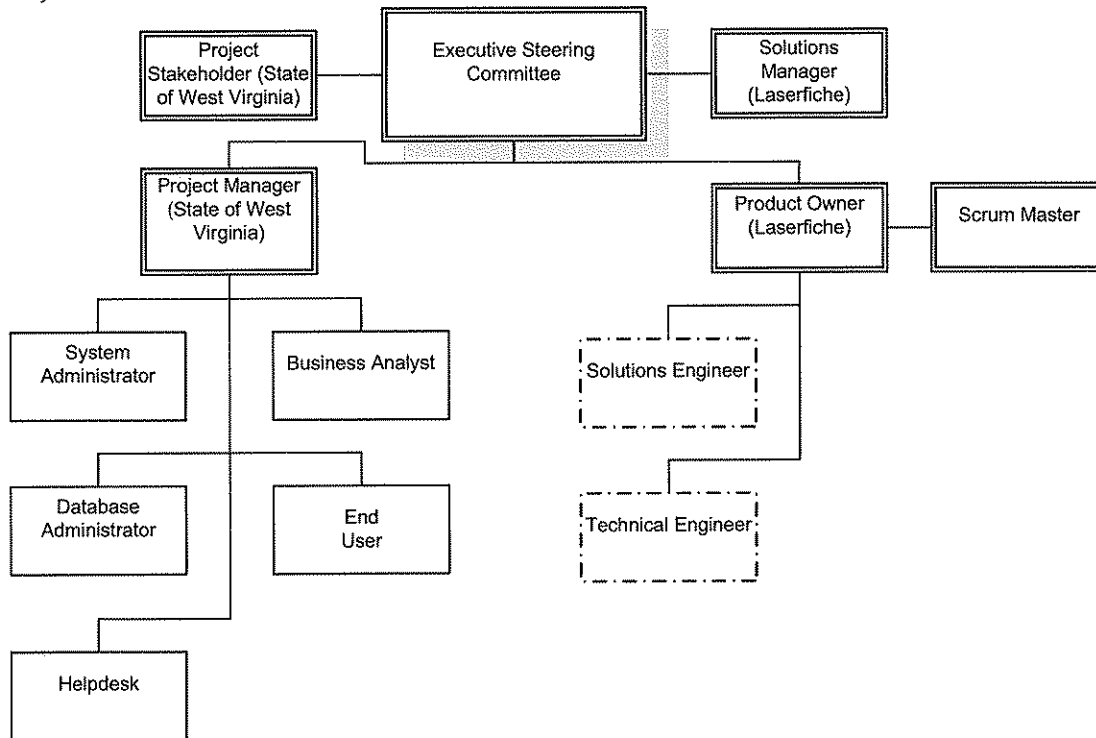
constant communication with the client and has found it to be an invaluable requirement toward providing success on a project. Scrum processes are an integral part to LSG's daily routine of managing projects and the individuals involved. Each member of the Scrum performs an integral part to ensuring the overall success of the project. In addition to providing the Agile project management oversight that drives project completion, it is LSG's goal to educate our clients on the Scrum process so that they can be actively involved in ensuring overall project success.

LSG highly recommends clients to designate a project manager or business owner to be active in the day-to-day Scrum processes starting from early on in the project engagement. This involvement covers working with the Laserfiche Product Owner to generate the User Stories contained in the Product Backlog and attendance at the Sprint Review where current product functionality is demonstrated by the Team at the end of the each sprint. It also serves as a forum for the client to suggest changes in process functionality or the addition of higher priority features to be implemented.

All projects run into unforeseen impediments that can potentially halt the timely progress of a project. It is imperative that the client and LSG formulate a mutual escalation plan to resolve these impediments in the most expedient manner possible. Scrum processes can locate such impediments and keep track of what tasks are being held up, but ultimately project stakeholders from both the client and LSG must ensure that impediments are addressed in a timely fashion. The project must go on!

Proposed Personnel/Management Approach

Project Governance Chart



Roles and Responsibilities

The roles and responsibilities for the State of West Virginia and Laserfiche staff are defined in the table below and refer to positions as identified in the organizational chart. The Executive Steering Committee consists of senior members from each group involved in the project. The primary purpose of this group is to articulate overall business goals driving the project, to gauge overall project progress, and to resolve high-level business requirements as escalated by the individual project teams. The State of West Virginia Project Stakeholder maintains overall control of the Executive Steering Committee as well as the ECM project. Executive Steering Committee meetings should also have a presence from project management staff as identified in the organizational chart.

State of West Virginia

<i>Project Stakeholder</i>	<ul style="list-style-type: none"> Champion project initiative!!! Review project business requirements Provide client oversight Manage business relationship with Laserfiche Resolve project business issues Work with Project Manager to monitor project status Attend Sprint Review Meetings
<i>Project Manager</i>	<ul style="list-style-type: none"> Coordinate day-to-day client project tasks and activities Monitor and control project Facilitate resolution of project issues, issue escalation Control project scope and changes Review project deliverables and obtain internal approvals Facilitate project communications Attend Sprint Review Meetings
<i>Business Analyst</i>	<ul style="list-style-type: none"> Analysis of internal business processes Decision support on solution design Facilitate communication between client end users, client IT staff, and the Laserfiche team
<i>System Administrator</i>	<ul style="list-style-type: none"> Provide IT services to support implementation of the solution Decision support on infrastructure architecture design Perform regular performance tuning of the application servers
<i>Database Administrator</i>	<ul style="list-style-type: none"> Provide initial configuration of the Microsoft SQL Server database Setup backup and restore procedures for the Laserfiche and Audit Trail SQL databases Provide ongoing performance monitoring and tuning of the SQL database server Perform regular backup and restore tests of the Laserfiche and Audit Trail SQL databases
<i>Helpdesk</i>	<ul style="list-style-type: none"> Troubleshooting of IT-related issues during implementation phases Provide first level of Laserfiche system support for internal State of Nebraska users Provide training for new staff on how to use the Laserfiche system

Laserfiche Solutions Group

<i>Solutions Manager</i>	<ul style="list-style-type: none"> Resolve escalated issues Help remove impediments Manage business relationship with the client
<i>Product Owner</i>	<ul style="list-style-type: none"> Define the features of the product, decide on release date and content Responsible for the profitability of the product (ROI) Constantly prioritizes the product backlog Can change features and priority of every sprint Accept or reject work results
<i>Scrum Master</i>	<ul style="list-style-type: none"> Help resolve impediments Ensure that the team is fully functional and productive Enable close cooperation across all roles and functions and remove barriers Shield the team from external interferences Ensure that the process is followed; invite to daily Scrum, Sprint Review, and Sprint Planning meetings
<i>The Team</i>	<ul style="list-style-type: none"> Cross-functional Negotiate the iteration goal and specifies tasks Has the right to do everything within the boundaries of the project guidelines to reach the iteration goal Organize itself and work Demo work results to the Product Owner and other Stakeholders
<i>Solutions Engineer</i>	<ul style="list-style-type: none"> Assist in analysis and documentation of business processes and technology Develop and test new business processes, capabilities and, as appropriate, supporting technologies Perform application design activities (e.g., writing functional designs) Provide technical infrastructure planning and implementation services Provide technical solution scoping and proposal development Integration work with 3rd party systems using Visual Basic or Visual C++/C# Database conversions for other imaging/document management products
<i>Technical Engineer</i>	<ul style="list-style-type: none"> Provide technical infrastructure planning and implementation services Provide training services and facilitate knowledge transfer to client staff Provide post-implementation decision and support services

Staffing

Jeff Huang, Technical Director, Laserfiche Solutions Group

Mr. Huang will serve as the Product Owner and Technical Director for the proposed professional service engagement. Mr. Huang joined Laserfiche in 1998 and has held positions as Software Support Engineer, System Engineer and Network Administrator before becoming the Director of Professional Services in January of 2005. Mr. Huang holds a Bachelor of Science degree in Biology from the University of California San Diego.

Jereb Cheatham, Director, Laserfiche Institute

Mr. Cheatham will assist the Product Owner with overall solution design and development of training curriculum. As the director of the Laserfiche Institute, Mr. Cheatham oversees all corporate training initiatives as well as the Laserfiche Institute Regional Events and the annual Laserfiche Institute Educational Conference. Having long championed the perspective of the user, Mr. Cheatham developed the transparent records management, distributed capture and report management strategies being proposed. Mr. Cheatham joined Laserfiche in 1999 as a Presales Engineer and has held positions as Solutions Consultant and Manager of Presales before becoming the Director of the Laserfiche Institute in October of 2006. Mr. Cheatham holds Bachelor of Arts degrees in Mathematics and Economics from St. Olaf College in Northfield, MN.

Justin Ugerio, Senior Solutions Engineer, Laserfiche Solutions Group

Mr. Ugerio has performed a broad range of tasks since joining Laserfiche in 2002 as a Support Engineer. His tasks included product demonstrations, systems configuration, troubleshooting, and regional training for the Laserfiche Institute. He has since joined the Professional Services Department of the Laserfiche Solutions Group where he leads our software customization and implementation team. Justin oversees all product installation, maintenance, and custom integration for the Laserfiche Solutions Group. Mr. Ugerio holds a bachelors degree in computer science from the University of California at Berkeley.

Fei Wang, Solutions Engineer, Laserfiche Solutions Group

Ms. Wang joined Laserfiche early in 2007 and has been an integral part of the Laserfiche Solutions Group in developing custom applications, data conversions, and complex workflow and imaging technologies. Ms. Wang has been the primary consultant for customization projects for clients such as the University of California Los Angeles, Office of the Chancellor, California State University Office of the Chancellor, and Molina Healthcare. Ms. Wang holds a Bachelor Degree in Computer Science from Princeton University as well as a Masters degree in Electrical Engineering from the California Institute of Technology.

Roy Chung, Technical Engineer, Laserfiche Solutions Group

Roy joined the Laserfiche Solutions Group in 2004 as a Solutions Engineer. His current duties include product installation, maintenance, training, and customization development for direct accounts. He also provides on-going support services for several Laserfiche direct accounts including the University of Southern California. Mr. Chung holds a Bachelor's Degree in Psychology from the University of California at Berkeley.

Training Services

Providing proper training is critical to the success of the implementation. In most cases, training is provided onsite, in groups according to role/function and using a copy of the production system. In this case we will work with the State of West Virginia implementation team in creating a Training plan which can include but not limited to Instructor lead (ILT) or Web based end-user training, ILT scan operator training, a Train the Trainer programs with a complete set of custom curriculum as well as hands-on system administrator training.

All general training materials are developed by the Laserfiche Institute, a separate division of Laserfiche that focuses primarily on user education. The Institute utilizes goal-based curriculum using clear and measurable objectives to create hands-on training and assessment programs that are very focused. These training programs are always customized to utilize the components and file plans of our customers so they learn using a replica of their own system. Training manuals are provided for all sessions and additional training videos are accessible through the Laserfiche Support Site (<http://support.Laserfiche.com>).

Course Name	Description	Len.	Class Size	Rec/Opt	Format	Prerequisite
Administrator Training	<p>System administrator training begins with the requirements analysis and documentation of the solution. The system administrator is highly encouraged to participate in the software installation and file plan configuration process so they understand how the system components work together.</p> <p>Formal system administrator training will utilize a replica of the production repository and case study based examples that teach best practices for performance monitoring, security configuration, template design and user management as well as backup and disaster recovery strategies. System administrators will also be taught how to utilize the technical knowledge base on the Laserfiche support site and what kind of information gathering will help get issues resolved quickly.</p>	8 hrs	1- 5	R	IL OL OS	Windows Server 2005/2008 operating systems Troubleshooting Performance Tuning IIS Configuration SQL Database Management Performance Tuning Basic SQL queries (SELECTs) Backup and Restore
User Training	Whenever possible, end users are put into	8 hr	5- 10	R	IL OL	

	<p>training groups according to their role within the system so that training sessions can be more focused. We prefer to train users in a computer lab at their site and utilize a replica of the production repository as well as the actual input devices they will be utilizing. Similar to System Administrator Training, it is expected for the eventual training to be involved in implementing Laserfiche early on in the project lifecycle. Laserfiche engineers will work with the trainer(s) to develop an initial User Acceptance Test procedure during the testing phase of the implementation. This UAT procedure will be used as the guide to formulate the eventual end-user training outline. Formal training will occur over a period of a few days. End User Training typically focuses on the folder browser, the document view, and searching. Special attention will be paid to the various ways to get documents into the database such as scanning, import, and Send To from Office applications. Training will also focus on any non-Laserfiche specific processes that are vital to workflows that have been developed. While a detailed training plan will be developed as part of our Project Management Methodology, a high level organizational chart has been included below.</p>				OS	
Developer Training	<p>Laserfiche offers application developer training at our corporate headquarters in Long Beach. However, formal training is rarely required for developers with a solid background in object oriented programming. The documentation provided</p>	4 hr s	1- 5	0	IL OS	Creating custom application with the Laserfiche Integrator's Toolkit is a task best left to those programmers with at least

	with our toolkit is very comprehensive and is typically all developers need to utilize our programming interfaces. If internal development staff is planning to complete some fairly complex projects, we usually recommend utilizing development consulting services from LSG instead of training.					1-2 years of VB or C++/C# experience. Basic GUI customization of the web interface can be done by web designer with a basic familiarity in Microsoft IIS, HTML, and ASP. More advanced GUI customizations of the web interface can be done by individuals with experience in ASP programming (1-2 years).
Workflow Training	Workflow training begins with a conceptual overview of how Workflow works. Basic terminology and components are introduced. From there, training focuses on the Workflow Designer user interface. The remainder of the class teaches how to develop workflow rules using the activities provided. In addition to building workflow rules, the class emphasizes how to troubleshoot problem workflows.	8 hr	1-5	R	IL OL OS	The Laserfiche Workflow Designer provides a easy to graphical user interface for designing workflow rules. Users with a background in programming will benefit from the logic required to properly design workflow rules. Programmers will also find it straightforward to develop custom Workflow activities to extend existing functionality or integrate with other system.
Quick Fields Training	Quick Fields training is designed to allow attendees to properly create their own Quick Fields sessions that can	8 hrs	1-5	R	IL OL OS	Quick Fields session setup is tailored to Business Analysis and

	<p>process a set of documents through a set of fairly complex rules. Training begins with an overview of Quick Fields and the various panes within the user interface. A basic session is created to give end users familiarity with how documents are processed in Quick Fields. Documents need to be imported, identified, indexed and filed away properly into the Laserfiche repository. Once the basic functionality has been introduced, most complex processes such as barcoding, ZoneOCR, Pattern Matching, and Real Time Lookup are introduced through hands on examples.</p>					<p>IT staff that are familiar with computers and business processes being implemented. A background in programming is recommended for those using Pattern Matching and required for those interested in extending functionality through Quick Fields scripting.</p>
Forms Design Training	<p>Forms Design Training begins with an analysis of the current paper based forms that will require redesign. Special attention will be paid to fields and how they are mapped to their respective line of business applications. Once the analysis is complete, a representative form will be chosen for the actual LincDoc forms design training. Training will focus on how to create a forms template in Microsoft Word that can then be published to a website. Training will also touch upon how to add certain business logic to forms. Finally, the sample form created will be configured to publish its contents to a Laserfiche repository.</p>	4 hr s	1- 5	R	IL OL OS	<p>LincDoc provides a point and click interface for developing web based forms. Strong experience with a graphical design tool like Visio will help in the ability to create custom forms. It is also expected for the Electronic Forms Designer to have at least some familiarity of the business processes they are designing for.</p>
Key: IL - Instructor Led, OL - Online, OS - Onsite						

Training Plan

Training Plan (Initial) and Cross Training

The objective of the training plan needs to focus on knowledge transfer of skills related to properly implementing Laserfiche allowing system administrators and staff to properly address future business processes and the content management needs of other departments.

During the initial phase of the project that will focus on meeting the requirements of the implementation, a number of training sessions have been identified for business analysts and IT staff. 40 hours of time have been allocated to general training to get the project members up to speed on all aspects of the software.

From experience, we find that the most successful projects get client team members comfortable with the software as soon as possible. Furthermore, it is critical to maintain that comfort level with the software throughout the project implementation cycle. The expectation is for staff to be involved in all aspects of project rollout from Hardware/Software Installation to File Plan Design to Document Capture to mapping out the Workflow processes. As far as formal training is concerned, 16 hours each have been allocated to Workflow, Forms Designer, and Quick Fields training. During the rollout phase, 16 hours have been assigned to End User Training and 8 hours to System Administrator training. Please note that while some end users will most likely be present during the end user training, most of the attendees will be either power users or identified training staff that can then perform the same training duties to actual end-users. An additional 8 hours of System Administrator training is allocated to the customizations identified in the proposal.

While LSG does offer a formal Toolkit Training class to developers who wish to write custom programs using the Laserfiche SDK, our experience has shown that the concepts behind the Toolkit are easy to grasp for programmers well versed in any of the primary Microsoft programming languages such as Visual Basic and C#. So rather than propose a formal training class, another block of 40 hours can be used as a sort of retainer to answer programming questions that will come up throughout the course of the implementation. If so requested, these hours can also be used by West Virginia Lottery Commission to develop sample code that can be reused for many different projects as in the case of a database migration utility or a web service.

Training Plan (Ongoing)

The flexibility that makes initial training easy to identify also makes ongoing training very difficult to predict. Beyond the workflow plans from Licensing and LVL Security, there is no way for the vendor to tell what types of projects will be implemented once Appendix C has been signed off. So based on past experience, the core classes as identified in the previous section are all repeated during ongoing training. These training sessions will take place on-site at the West Virginia Lottery Commission facilities and can be scheduled at the client's request. Additionally, through the proposed VIP contract, an additional block of hours are made available to implementation teams as they move forward with future departmental needs. These hours can be used at West Virginia Lottery Commission's discretion but typically training is a big component in terms of how these hours are used.

Course Outlines

All training is implementation specific to make sure users and administrators understand how to use their solution. However, all training courses follow the same general outlines listed below.

Administrative Training

1. Laserfiche Architecture
 - 1.1 Client and Server Architecture
 - 1.2 Repository architecture
 - 1.3 Database Management Systems
 - 1.4 Networking and Security
 - 1.4.1 Distributing Server Components
 - 1.4.2 Client Software and Communications
 - 1.4.3 Securing Volume Files Using Windows Security
2. Installations
 - 2.1 Before You Begin
 - 2.1.1 Laserfiche 7 Requirements
 - 2.1.2 File Locations
 - 2.1.3 Communications Requirements
 - 2.1.4 Permissions
 - 2.2 Installation
 - 2.2.1 Installing the Laserfiche Server
 - 2.2.2 Installing the Laserfiche Client
 - 2.2.3 Installing Laserfiche Scanning
 - 2.2.4 Configuring DCOM
 - 2.2.5 Firewall Compatibility Component
3. Admin Console
 - 3.1 Repository Creation
4. Configuring Your Repository
 - 4.1 Users and Groups
 - 4.1.1 Tips for Users and Groups
 - 4.1.2 Creating and Modifying Users
 - 4.1.3 Creating and Modifying Groups
 - 4.1.4 Windows Accounts
 - 4.2 Trustee Management
 - 4.2.1 Password Policy
 - 4.3 Template Design
 - 4.3.1 What are Templates?
 - 4.3.2 Designing Templates
 - 4.3.3 Template Field Security
 - 4.3.4 Creating templates
 - 4.4 Other Metadata
 - 4.4.1 Tags
 - 4.4.2 Document Relationships
 - 4.4.3 Public Stamps
 - 4.5 Volumes
 - 4.6 What are volumes?
 - 4.7 Types of Volumes

- 4.7.1 Volume Location
 - 4.7.2 Fixed and Removable Paths
 - 4.8 Managing Volume Sizes
 - 4.9 Preventing Changes to a Volume
 - 4.9.1 Read-Only Volumes
 - 4.9.2 Permanent Volumes
 - 4.9.3 Changing a Volume's Location
 - 4.10 Detaching, Exporting and Attaching Volumes
 - 4.11 Repository Activity
 - 4.11.1 Sessions
 - 4.11.2 Checked Out Documents
 - 4.12 Indexing
 - 4.12.1 General Tab: Auto-Indexing and Restoring Defaults
 - 4.12.2 Stop Words
 - 4.12.3 Delimiter Characters
 - 4.12.4 Re-indexing
 - 4.13 Auditing
 - 4.13.1 Tips for Auditing
 - 4.13.2 Audit Levels
 - 4.13.3 Enabling Auditing
 - 4.13.4 Audit Reports
 - 4.13.5 Tracking Exporting and Printing
 - 4.13.6 Watermarks
 - 4.14 Repository Options
- 5. Server Administration
 - 5.1 Server Information
 - 5.2 Connections
 - 5.3 Tracing
 - 5.4 License Pooling
- 6. Laserfiche Security
 - 6.1 Authentication and Authorization
 - 6.1.1 Authentication
 - 6.1.2 Authorization
 - 6.2 Order of Precedence and Inheritance
 - 6.3 Setting Up Security
 - 6.3.1 Starting Out
 - 6.3.2 Using Groups
 - 6.3.3 Entry Access Rights
- 7. Backup and Disaster Recovery
 - 7.1 Backing Up Your Laserfiche Repositories
 - 7.2 Basic Principles of Data Backup
 - 7.2.1 Test Your Backups
 - 7.2.2 Back Up Often
 - 7.2.3 Back Up All Necessary Files
 - 7.3 Components
 - 7.3.1 SQL Databases
 - 7.3.2 Index files
 - 7.3.3 Volumes

- 7.4 Running Backups
- 8. Troubleshooting
 - 8.1 Step One: What is the problem?
 - 8.1.1 Describe the problem.
 - 8.1.2 Get the vital facts about the installation.
 - 8.1.3 Determine the scope of the problem, and when it started.
 - 8.2 Step Two: What could be causing the problem?
 - 8.3 Step Three: What is the solution?
 - 8.3.1 Check your configuration.
 - 8.3.2 Take advantage of available resources.

User Training

- 1. Using the Folder Browser
 - 1.1 Designing a Folder Structure
 - 1.1.1 Tips for Creating an Easy-to-Use Folder Structure
 - 1.2 Navigating the Folder Browser
 - 1.2.1 Navigating the Folder Pane
 - 1.2.2 Navigating the Contents Pane
 - 1.3 Managing Folders and Documents
 - 1.3.1 Creating Folders and Documents
 - 1.3.2 Moving Folders and Documents
 - 1.4 Customizing the Folder Browser
- 2. Viewing and Working With Documents
 - 2.1 Types of Documents
 - 2.2 The Document Viewer
 - 2.2.1 Image Pane
 - 2.2.2 Text Pane
 - 2.2.3 Metadata Pane
 - 2.2.4 Thumbnail Pane
 - 2.3 Customizing the Document Viewer
 - 2.4 Electronic Documents
 - 2.4.1 Opening Electronic Documents
 - 2.4.2 Electronic Document Check In and Check Out
 - 2.5 Annotations
 - 2.5.1 Stamps
 - 2.5.2 Sticky Notes
 - 2.5.3 Highlights
 - 2.5.4 Redactions
 - 2.5.5 Linking Text and Image Annotations
- 3. Document Metadata
 - 3.1 Templates
 - 3.1.1 What are Templates?
 - 3.1.2 Designing Templates
 - 3.1.3 Creating templates
 - 3.1.4 Filling Template Fields
 - 3.2 Tags
 - 3.2.1 Informational Tags
 - 3.2.2 Security Tags

- 3.2.3 Viewing Tags
 - 3.2.4 Creating and Applying Tags
 - 3.3 Links
 - 3.3.1 Viewing Document Links
 - 3.3.2 Linking and Unlinking Documents
 - 3.4 Versions
 - 3.4.1 Why Use Versions?
 - 3.5 Versions and Version Groups
 - 3.5.1 The Versions Dialog
 - 3.5.2 Version Comments
 - 3.5.3 Version Display
 - 3.5.4 Version Searches
 - 3.6 Creating New Versions
 - 3.6.1 Saving an Electronic Document as a New Version
 - 3.6.2 Designating an Existing Document as the Latest Version
 - 3.6.3 Importing a Document as the Latest Version
- 4. Searching
 - 4.1 Wildcards
 - 4.2 Basic Searches
 - 4.2.1 Basic Search Types
 - 4.3 Combining Searches
 - 4.4 Advanced Searching
 - 4.5 Search Options
- 5. Importing Documents
 - 5.1 Configuring Default Behavior for New Documents
 - 5.2 Import Methods
 - 5.2.1 Import Dialog
 - 5.2.2 Dragging and Dropping From Windows
 - 5.2.3 "Send To" from Windows
 - 5.2.4 Best Practices for Importing
- 6. Exporting and Printing Documents
 - 6.1 Export Options
 - 6.2 Export Methods
 - 6.2.1 Text, Images and Electronic Documents
 - 6.2.2 Briefcases
 - 6.2.3 E-Mailing Documents
 - 6.3 Copying and Pasting
 - 6.4 Printing
- 7. Snapshot
 - 7.1 When to Use Snapshot
 - 7.2 Snapshot Configuration
 - 7.2.1 General
 - 7.2.2 Destination
 - 7.2.3 Template
 - 7.2.4 Tags
 - 7.2.5 Document Handling
 - 7.2.6 Advanced
 - 7.3 Snapshot Printer Properties

- 7.4 Using Snapshot in the Client
- 7.5 Using Snapshot in Other Applications
- 8. Scanning
 - 8.1 Getting Started with Laserfiche Scanning
 - 8.2 How Does It Work?
 - 8.3 Choosing a Scanning Mode
 - 8.4 Scan Sources
 - 8.5 Basic Scanning
 - 8.5.1 Basic Scanning Quick Start
 - 8.5.2 Default Properties
 - 8.5.3 Options
 - 8.6 Standard Scanning
 - 8.6.1 Standard Scanning Quick Start
 - 8.6.2 Default Properties
 - 8.6.3 Image Processing
 - 8.7 Other Options
 - 8.7.1 Scanning into an Existing Document

Software Support

In meeting the Ongoing Maintenance and Support Levels provision of the RFP and to further describe the type of support services that will be provided, the Laserfiche Software Assurance Plan (LSAP) guarantees response times of at most 4 hours. We are available via e-mail, phone and direct-to-Laserfiche Web chat from 6:00 AM to 6:00 PM every business days, and are often, but not always, available during other hours and weekends. The LSAP provides new releases and product updates, 100% credit of the purchase price toward a new system or a system upgrade. Our support site features 24/7 access to the Knowledge Base articles, discussion forums and educational resources. We also provide fast-track escalation for rapid resolution of urgent support cases, and preferred pricing on Laserfiche user education programs, including Regional Training and the annual Laserfiche Institute Conference.

Laserfiche® Software Assurance Plan

PLEASE TAKE THE TIME TO READ THE FOLLOWING TERMS AND CONDITIONS OF THE LASERFICHE SOFTWARE ASSURANCE PLAN (“LSAP”) BY WHICH COMPULINK MANAGEMENT CENTER, INC. (“COMPULINK”) AND YOUR AUTHORIZED LASERFICHE RESELLER (“VAR”) WILL PROVIDE SERVICE, MAINTENANCE AND UPDATES FOR YOUR LASERFICHE SOFTWARE. THIS AGREEMENT IS BETWEEN YOU AND COMPULINK. BY ACCEPTANCE OF THE LSAP, YOU AGREE TO ACCEPT ALL OF ITS TERMS AND CONDITIONS AS DESCRIBED IN THIS AGREEMENT. HERE ARE THE DETAILS OF YOUR LASERFICHE SOFTWARE ASSURANCE PLAN:

Your Software. For purposes of this Agreement, the Laserfiche Software covered under this Agreement is described on the Laserfiche Product Registration Card which accompanied your purchase.

Your Laserfiche Reseller Will Provide the Assistance You Need. Your authorized Laserfiche reseller has provided you with a telephone number to contact whenever you need assistance with your Laserfiche software. To better assist your reseller in serving you, we suggest you do the following:

- Prepare for the call. You should be prepared to describe any hardware on which your Laserfiche Software is installed, including the manufacturer's model numbers.
- Explain your problem clearly. Let your reseller know exactly what the error was; what you were doing immediately before the error occurred; whether by repeating the steps leading to the error, you encounter the same problem; the exactly wording of any error message; and what efforts you have already taken to solve the problem.
- Be patient and cooperate with your reseller. Experience shows that most system problems and errors can be corrected over the phone if there is close cooperation between the user and the technician. Listen carefully to your reseller's questions and instructions, and try to follow any suggestions precisely.

What Your Laserfiche Software Assurance Plan Provides to You. Your Laserfiche Software Assurance Plan is designed to provide you with the software care and assistance you need to service and maintain your Laserfiche document imaging system, and to provide you with the updates and “fixes” needed to keep your Laserfiche Software up and running. To accomplish these goals, the Laserfiche Software Assurance Plan provides, through your authorized Laserfiche reseller, the following benefits:



- Hotline support and assistance through your authorized Laserfiche reseller to help you solve software problems promptly. Your Laserfiche reseller is trained to solve your problems by phone, e-mail, or, if needed, by an on-site visit, and provides your first line of response. By purchasing the Laserfiche Software Assurance Plan, your reseller will be able to handle most, if not all, of the questions that may arise regarding operation of the software, and any problems you may encounter.

- Your Laserfiche reseller can seek special assistance from Laserfiche's in-house Software Technicians when you encounter an infrequent or especially difficult problem. Laserfiche can assist your reseller in addressing unusual and challenging problems which can arise from viruses, worms, and even new hardware and software applications. Laserfiche guarantees your authorized Laserfiche reseller a response by the next business day. And, if you are a Priority LSAP subscriber, Laserfiche guarantees your authorized Laserfiche reseller a high-priority response within four hours, and usually within 45 minutes.

- Free software updates to maintain maximum system performance. Sometimes unforeseen software problems arise that require a special "fix." If your Laserfiche authorized reseller cannot fix the problem, Laserfiche's Software Technicians are available to provide a software fix at no additional charge whenever the problem arises from your Laserfiche Software.

- Feature enhancements to deliver increased productivity. From time to time, Laserfiche adds features and performance enhancements to an existing version of its software, which are known as "updates" and "upgrades." Updates are enhancements to existing features which are designed to improve performance and correct any problems discovered in the current version of your Laserfiche Software. LSAP subscribers receive all updates without charge. Upgrades consist both of significant improvements in existing features and new features not included in the current version of your Laserfiche Software. As an LSAP subscriber, these important upgrades will be offered to you at special reduced prices.

- 100% credit toward the purchase of new versions of Laserfiche. Laserfiche periodically publishes new versions of its Software. Historically, the new version of Laserfiche offers a bundle of new and exciting features not previously included in the prior version, as well as significant improvements in system design and architecture, all of which combine to improve performance and capability. Because of the many new features and performance enhancements, the new version of Laserfiche inevitably is priced higher than the previous version. Nevertheless, LSAP subscribers are entitled to credit 100% of the purchase price of their existing Laserfiche Software toward the purchase the new version of Laserfiche Software. Naturally, Laserfiche can only credit the price you actually paid for your current version of the Laserfiche Software against the new version, and cannot credit the annual LSAP payments or other interim purchases you may have paid your authorized Laserfiche reseller for items such as installation, training, upgrades, ancillary programs, additional service and consulting.

- 24-hour FTP and Web access to drivers and update files. LSAP subscribers receive free 24-hour FTP access to each new Laserfiche release, as well as updated drivers. Laserfiche routinely issues two to four new releases each year. By installing all updates and upgrades for your Laserfiche Software, you are assured the best possible performance. The Laserfiche Web site also contains more support information and answers to frequently asked questions.

- Government agencies - maintain eye-readability compliance.

- Regulated industries - maintain compliance with electronic records retention rules.

- Monthly newsletters and technical updates to keep you current on the latest system and records developments. LSAP subscribers receive monthly newsletters and technical bulletins to keep you informed on how to maximize the benefits of your Laserfiche Software.

- Preventative maintenance with optional on-site support from your authorized Laserfiche reseller. Your authorized Laserfiche reseller may offer additional on-site service and

support plans to provide routine maintenance visits. Depending on the complexity and sophistication of your entire hardware and software needs, your reseller may suggest a scheduled preventative maintenance program to eliminate cumulative problems that would otherwise go unnoticed by everyday users, but could result in serious system downtime if left unattended. Your reseller may also arrange for ongoing in-house training to improve the benefits of the Laserfiche system for current and new staff.

You may renew your LSAP annually. Your LSAP commences on the date shown on your LSAP Product Registration Card, which Laserfiche has provided you, and your benefits continue for a year after the commencement date. Laserfiche believes that its Laserfiche Software Assurance Plan is an essential component of your system, and that the LSAP offers real value to the subscriber. Consequently, Laserfiche urges you to renew your LSAP annually. Laserfiche and your reseller will contact you before the expiration date of your LSAP to assist you in renewing your LSAP and thereby avoid any inadvertent gaps in coverage.

You may transfer your Laserfiche Software Assurance Plan. You are entitled to transfer your LSAP to someone who purchases the computer hardware on which your entire Laserfiche Software is installed, provided that you strictly comply with all the conditions of this paragraph. To do so, you must notify, in writing, both your authorized Laserfiche reseller and Laserfiche of the name, address and telephone number of the proposed transferee. Your reseller will give you further information regarding how to give notice of transfer if you later seek to do so. In case of transfer of the LSAP, your transferee will be subject to all of the terms and conditions of this Agreement. However, please note that, if your transferee is outside the service area of your authorized Laserfiche reseller, Laserfiche will charge a fee to provide another authorized Laserfiche reseller to furnish service to your transferee. If there is no authorized Laserfiche reseller in the immediate vicinity of your transferee's place of business, Laserfiche may, in its sole and absolute discretion, refuse to authorize the transfer. No transfer will be valid unless approved by Laserfiche in writing.

LIMITED WARRANTY; DISCLAIMER. THIS AGREEMENT IS THE COMPLETE AND EXCLUSIVE STATEMENT OF THE OBLIGATIONS OF COMPULINK AND YOUR AUTHORIZED LASERFICHE RESELLER REGARDING THEIR OBLIGATIONS UNDER THE LASERFICHE SOFTWARE ASSURANCE PLAN, AND SUPERSEDES ALL OTHER REPRESENTATIONS, WARRANTIES, GUARANTIES AND PROMISES RELATING TO THE SUBJECT MATTER OF THIS AGREEMENT. COMPULINK DOES NOT WARRANT THE ERROR-FREE OPERATION OF LASERFICHE SOFTWARE. EXCEPT AS EXPRESSLY STATED ABOVE, COMPULINK DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, INCLUDING THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, WITH RESPECT TO THE SOFTWARE AND SERVICES.

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Some states do not allow the exclusion of implied warranties, so the above exclusions may not apply to you. In that event, any implied warranties are limited in duration to 90 days from the date of service or assistance provided to you under your LSAP. However, some states do not allow limitations on how long an implied warranty lasts, so the above limitation may not apply to you. This limited warranty gives you specific legal rights, and you may have other rights that vary from state to state. Some states do not allow the limitation or exclusion of liability for incidental or consequential damages, so the above limitation or exclusion may not apply to you. The limitations of damages or liability set forth in this Agreement are fundamental elements of the basis of the bargain between Compulink and you. You acknowledge and agree that Compulink would not be able to provide this product on an economic basis without such limitations.

OTHER TERMS AND CONDITIONS. Scope of Agreement. If any provision of this Agreement is found to be unlawful, void, or unenforceable, that provision shall be severed from this Agreement and will not affect the validity and enforceability of any of its remaining provisions. This Agreement does not limit any rights that Compulink may have under trade secret, copyright, patent or other laws. Compulink's resellers, dealers and distributors are not authorized to modify this Agreement, or to make any additional representations, commitments, or warranties binding on Compulink.

Limitation on Scope of Benefits. This Agreement extends only to original purchasers of the Software and to any transferee who has complied with all transfer requirements of this Agreement. This Agreement extends only to the uses for which the Laserfiche Software was designed. Preventive maintenance is not included. Installation, de-installation, or relocation services and operating supplies are not included. Services necessitated by alterations, additions or deletions, adjustments, or repairs by anyone other than Compulink or its authorized Laserfiche reseller, and services which are necessary due to defects or problems in your hardware or non-Laserfiche Software are specifically excluded. Compulink is not obligated to service or repair any system or component which has been damaged as a result of: (i) accident, misuse, neglect, failure to follow instructions for proper use, care or cleaning of your hardware or Laserfiche Software, (ii) an act of God such as, but not limited to, lightning, flooding, tornado, earthquakes, and hurricanes, (iii) failure due to an external factor (fire, flood, failures or fluctuations of electrical power or air conditioning), (iv) abuse or excessive wear and tear, (v) the loading of software, software configurations or any data files, worms or viruses which may corrupt your Laserfiche Software, or (vi) the moving of your system from one geographic location to another or from one purchaser or entity to another.

Assignment. Compulink reserves the right to assign its obligations to perform the terms and conditions of this Agreement to a qualified third party designated by Compulink. In that event, you agree to look solely to Compulink's designee for performance of Compulink's obligations under this Agreement.

Exclusive Agreement. This Agreement contains the sole and exclusive agreement between you and Compulink relating to its subject matter. It shall not be modified or amended in any way by any purchase order or other document issued by you, but may be amended only by a writing signed by both you and Compulink and specifically referring to it.

Additional Services. With regard to any services that are not within the scope of services under this Agreement, it will be within Compulink 's discretion whether to perform the services, and, if Compulink elects to perform the services, the services will be subject to an additional charge to be paid by you.

Important Notice. Before requesting services, it is your responsibility to back up the software and data on your system's hard disk drive and on any other storage device(s) in the system. Under no circumstances shall Compulink be responsible for any loss of any software or data.

Force Majeure. Compulink is not liable for any failure or delay in performance due to any cause beyond its control. In any event, if Compulink's ability to render repair services is impaired by you or circumstances beyond Compulink's control, Compulink may terminate this Agreement.

Law; Jurisdiction. This Agreement will be governed and construed by the laws of the State of California. The headings are for convenience only and are not to be used to interpret this Agreement. All disputes between you and Compulink shall be litigated in the state and federal courts located in Los Angeles County, California.