

	Rejections & Deletions					
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.8	Un-rejected documents in a package should retain their cashiering information as entered by an Examiner	Existing Core Product		
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.9	Packages should retain their queue designation even when they contain rejected documents	Existing Core Product		
Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.1	Ability for Examiner to pull packages from specific queues (8AM, Daily, etc.)	Existing Core Product		
Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.10	Management dashboard must display the Auto-Retrieval (Push/Pull) control panel	Existing Core Product		
Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.11	Management dashboard and Auto-Retrieval (Push/Pull) control panel must automatically refresh on a specified time interval	Existing Core Product		

Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.13	<p>Management dashboard must display the following data:</p> <ul style="list-style-type: none"> • SECURE package order number • Package status • SECURE submission date and time • Application retrieval date and time • Package recording date and time • Submitter • Package level workflow status which includes assignment Information and step in workflow • Queue 	Existing Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.14	<p>Ability for Management dashboard to default view to current day's date</p>	Existing Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.15	<p>Ability to view a package's supporting details directly on the management dashboard screen</p>	Existing Core Product	

Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.16	<p>Management dashboard must display the following supporting details when staff members select a specific package in the filtered results list:</p> <ul style="list-style-type: none"> • Document status • Rejection reasons • Recording number(s) • Submitter information • Application's package number • Queue information • Last modified by 	Existing Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.17	Ability to edit layout and content of dashboard in regards to displayed fields, column size/order, data sorting, etc.	Existing Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.18	<p>Document Search functionality which allows staff member to search on the following items:</p> <ul style="list-style-type: none"> • Document number • Recording date • SECURE submission date • Submitter • Package order number 	Existing Core Product	

Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.19	Document Search functionality which displays the following items: <ul style="list-style-type: none"> • Document number • Associated package information, if applicable • Associated document numbers, if applicable • Recording date, if applicable • SECURE submission date • Submitter • Package order number • Document title/code 	Existing Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.20	Ability for staff members to easily navigate/link to full package details from management dashboard, examiner's task lists, document search, etc.	Existing Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.4	Ability to pin and un-pin packages in an Examiner's queue for holding purposes	Existing Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.5	Ability to release a package back to the main queue or into the next workflow process	Existing Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.7	Ability for Examiners to view high-level package information for packages in their queue. Information includes but is not limited to the following: package name, concurrency, queues, notes,	Existing Core Product	

			SECURE retrieval date/time and status		
Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.8	Ability to send instant messages within the application to all staff members or individual examiners	Existing Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Workflow Management	ERD9.9	Lead Examination staff must have a management dashboard that provides them a snapshot of the following statistics: Package and Document Summary by Status and Package and Document Summary by Queue	Existing Core Product	
Examining	Up-front Scanning	EXM1.1	System must have the option to have up-front scanning of all documents	Existing Core Product	
Examining	Up-front Scanning	EXM1.10	Ability to display the document image(s), including associated PCORs and supporting documentation where required for quality control purposes	Existing Core Product	
Examining	Up-front Scanning	EXM1.11	When documents are scanned into system, they must retain the order in which they were scanned	Existing Core Product	
Examining	Up-front Scanning	EXM1.12	Ability to move documents and images if necessary within the batch	Existing Core Product	
Examining	Up-front Scanning	EXM1.13	Ability to add/move/delete pages within the batch	Existing Core Product	
Examining	Up-front Scanning	EXM1.14	System should have the ability to cancel a batch	Existing Core Product	

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Examining	Up-front Scanning	EXM1.4	Examiners will examine the documents using the system	Existing Core Product	
Examining	Up-front Scanning	EXM1.5	System will need to have the ability to scan official records, PCORs and supporting documentation	Existing Core Product	
Examining	Up-front Scanning	EXM1.6	System will need to have the ability to place official records, PCORs and supporting documentation in the correct queue with configurable business rules	Existing Core Product	
Examining	Up-front Scanning	EXM1.8	System should validate the number of pages scanned matches at the time the batch is closed	Existing Core Product	EagleSoftware currently calculates and enters in the number of pages based on the images selected.
Examining	Up-front Scanning	EXM2.1	System should have an examining queue for each office	Existing Core Product	
Examining	Up-front Scanning	EXM2.11	Within each queue, batches must be placed and assigned in FIFO order	Existing Core Product	
Examining	Up-front Scanning	EXM2.12	Have the ability for the system owners to manage, edit, and create new queues	Existing Core Product	

Examining	Up-front Scanning	EXM2.13	System must have the option to enable Examining staff members to utilize a dual monitor configuration where indexing data is displayed on one monitor and the associated image(s) on a second monitor. This configuration allows the staff members to scroll through, magnify/rotate images, preview and move endorsements, print and other standard image examination tools	Existing Core Product	
Examining	Up-front Scanning	EXM2.16	The system must allow examiners to preview all pages in the same document in a thumb nail view	Existing Core Product	Nine thumb nails are viewable in each thumb nail "page".
Examining	Up-front Scanning	EXM2.17	Examiner should have the ability to rotate images and save the setting if desired	Existing Core Product	
Examining	Up-front Scanning	EXM2.18	The system should capture all title/images/receipting data for a multi-title document on one screen	Existing Core Product	
Examining	Up-front Scanning	EXM2.2	Ability for lead staff to configure staff member rights for the examining queue	Existing Core Product	
Examining	Up-front Scanning	EXM2.20	The Examination module will be configured to support the staff's examination of the submitted document(s) for a record-ability determination and receipting of the document(s) in a batch, e.g. viewing all pages, zooming in on endorsements, etc.	Existing Core Product	

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Examining	Up-front Scanning	EXM2.23	Once the document(s) in a batch have been examined for record-ability, receipted, accepted and released to the new Recorder system, the staff's subsequent interaction with the document will be logged in the event log	Existing Core Product	
Examining	Up-front Scanning	EXM2.24	Ability for a lead user to create and configure forms that will be called up, utilized, endorsed and printed within the examination process. These forms will include fill in fields and/or check boxes and/or combo boxes, etc.	Existing Core Product	
Examining	Up-front Scanning	EXM2.25	System must have the ability for staff members to assign packages to other staff members	Existing Core Product	
Examining	Up-front Scanning	EXM2.26	System must have the ability to track if a staff member assigns packages to another staff member	Existing Core Product	
Examining	Up-front Scanning	EXM2.27	Ability for a lead staff member to assign a batch from any queue to another queue without losing the sequence of submission	Existing Core Product	EagleSoftware does not use the concept of batches; documents or packages can be assigned.
Examining	Up-front Scanning	EXM2.28	After examination, each batch will need to be dispositioned as either rejected or accepted	Existing Core Product	

Examining	Up-front Scanning	EXM2.29	Lead staff members must be able to see the status of all batches within the workflow	Existing Core Product	EagleSoftware does not use the concept of batches in workflow; documents and/or packages can be tracked.
Examining	Up-front Scanning	EXM2.3	System should be able to configure separate workflow queues for examining, e.g. Counter queue, Mail queue, etc.	Existing Core Product	
Examining	Up-front Scanning	EXM2.30	Ability for system to track and display batch status	Existing Core Product	EagleSoftware does not use the concept of batches in workflow; documents and/or packages can be tracked.
Examining	Up-front Scanning	EXM2.31	Ability for system to track and display document status	Existing Core Product	
Examining	Up-front Scanning	EXM2.32	Batch and document status should automatically change to reflect all corrections, deletions, rejections and completions	Existing Core Product	
Examining	Up-front Scanning	EXM2.33	System should clearly identify batch and document status in Examiner's task list and queue	Existing Core Product	EagleSoftware does not use the concept of batches in workflow; documents and/or packages can be

						tracked.
Examining	Up-front Scanning	EXM2.4	System must receive and track documents within the "8AM" and "Daily" Queues	Existing Core Product		
Examining	Up-front Scanning	EXM2.5	The queues should dictate the order in which documents are processed by examiners and the endorsement time stamps	Existing Core Product		
Examining	Up-front Scanning	EXM2.6	Documents submitted to the 8AM queue will always receive an "8:00AM" time stamp regardless of when they are cashiered/recorded	Existing Core Product		
Examining	Up-front Scanning	EXM2.7	Documents that are submitted to the "Daily" queue and that are cashiered/recorded before 8:00AM will always receive an "8:00AM" time stamp	Existing Core Product		
Examining	Up-front Scanning	EXM2.8	Documents that are submitted to the "Daily" queue and that are cashiered/recorded after 5:00PM will receive a "5:00PM" time stamp	Existing Core Product		
Examining	Up-front Scanning	EXM2.9	Documents that are submitted to the "Daily" queue and that are cashiered/recorded in between 8:00AM and 5:00PM will receive a "real-time" time stamp at the time of	Existing Core Product		

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			cashiering/recording		
Examining	Document Rejection	EXM3.1	Ability to create an electronic rejection notice, populating the submitter information and referencing the temporary batch number	Existing Core Product	EagleSoftware does not use the concept of batches. Paper and electronic rejection notices can be created for documents and packages.
Examining	Document Rejection	EXM3.2	Ability for the staff to enter single or multiple rejection reasons	Existing Core Product	
Examining	Document Rejection	EXM3.3	Ability for the staff to enter rejection notes	Existing Core Product	
Examining	Document Rejection	EXM3.4	Ability to reject an entire batch	Existing Core Product	Documents and packages of documents can be rejected.
Examining	Document Rejection	EXM3.5	Documents being rejected should be sent back to the submitter only after the Examiner has reviewed all documents in a batch	Existing Core Product	
Examining	Document Rejection	EXM3.6	Ability to create a separate rejection letter for each rejected document	Existing Core Product	
Examining	Document Rejection	EXM3.7	Ability to print the temporary batch# and document # on the rejection letter	Existing Core Product	

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Examining	Document Rejection	EXM3.8	Ability to create one rejection letter for the entire batch	Existing Core Product	
Examining	Document Stamps/Annotations	EXM4.1	System must have the ability to configure electronic stamps for use on receipting	Existing Core Product	
Examining	Document Stamps/Annotations	EXM4.3	Creation/modification of electronic stamps should be set by security level settings	Existing Core Product	
Examining	Document Stamps/Annotations	EXM4.4	Ability to create and configure standard stamps and endorsements in respect to their size, content and placement. Types include: recording endorsement, approval stamps, notice sent, etc.	Existing Core Product	Stamps and endorsements are configured during system setup.
Examining	Document Stamps/Annotations	EXM4.5	Ability to set a default location for standard endorsements with the ability for Examiners to adjust location, if needed	Existing Core Product	
Examining	Document Stamps/Annotations	EXM4.6	Ability for staff to view actual endorsement size and placement on the document being examined and have the ability to adjust the location of the endorsement, if needed	Existing Core Product	
Examining	Workflow Management	EXM5.1	Ability for Examiner to pull batches from specific queues ("8AM", "Daily", etc.)	Existing Core Product	EagleSoftware does not use the concept of batches in workflow; documents and/or packages can be pulled or assigned.

Examining	Workflow Management	EXM5.10	Management dashboard must allow filtering on the following data: <ul style="list-style-type: none"> • Batch status • Submission date/time • Batch recording date • Submitter • Batch name and/or number • Queue 	Existing Core Product	Assumes that batches mean documents and packages.
Examining	Workflow Management	EXM5.11	Management dashboard must display the following data: <ul style="list-style-type: none"> • Batch number • Batch status • Submission date and time • Batch recording date and time • Submitter • Batch level workflow status which includes assignment information and step in workflow • Queue 	Existing Core Product	Assumes that batches mean documents and packages.
Examining	Workflow Management	EXM5.12	Ability for the Management dashboard date to default to the current day's date	Existing Core Product	
Examining	Workflow Management	EXM5.13	Ability to view a batch's supporting details directly on the management dashboard screen	Existing Core Product	

Examining	Workflow Management	EXM5.14	<p>Management dashboard must display the following supporting details when staff member selects a specific batch in the filtered results list:</p> <ul style="list-style-type: none"> • Document status • Rejection reasons • Recording number(s) • Submitter information • Application's batch number • Queue information • Last modified by 	Existing Core Product	
Examining	Workflow Management	EXM5.15	<p>Ability to edit the layout and content of the dashboard in regards to displayed fields, column size/order, data sorting, etc.</p>	Existing Core Product	
Examining	Workflow Management	EXM5.16	<p>Document Search functionality which allows staff member to search on the following items:</p> <ul style="list-style-type: none"> • Document number • Recording date • Submission date • Submitter • Batch name and/or number 	Existing Core Product	

Examining	Workflow Management	EXM5.17	Document Search functionality which displays the following items: <ul style="list-style-type: none"> • Document number • Associated batch Information, if applicable • Associated document numbers, if applicable • Recording date, if applicable • Submission date • Submitter • Batch name and/or number • Document title/code 	Existing Core Product	
Examining	Workflow Management	EXM5.18	Ability for staff members to easily navigate/link to full batch details from management dashboard, examiner's task lists, document search, etc.	Existing Core Product	
Examining	Workflow Management	EXM5.4	Ability to pin and un-pin batches in a staff member's queue for holding purposes	Existing Core Product	Assumes that batches mean documents and packages.
Examining	Workflow Management	EXM5.5	Ability to release a batch back to the main queue or into the next workflow process	Existing Core Product	Assumes that batches mean documents and packages.
Examining	Workflow Management	EXM5.6	Ability for Examiners to see a snapshot of the total number of pending batches and documents in system from their task/work screen	Existing Core Product	Assumes that batches mean documents and packages.

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Examining	Workflow Management	EXM5.7	Ability for Examiners to view high-level batch information for batches in their queue. Information includes but is not limited to the following: batch name, concurrency, queues, notes, date/time and status	Existing Core Product	Assumes that batches mean documents and packages.
Examining	Workflow Management	EXM5.8	Ability to send instant messages within the system to all staff members or individual staff members	Existing Core Product	
Examining	Workflow Management	EXM5.9	Examination managers must have a management dashboard that provides them a snapshot of the following statistics: Batch and Document Summary by Status and Batch and Document Summary by Queue	Existing Core Product	Assumes that batches mean documents and packages.
Examining	Administration	EXM6.1	Ability for lead users to manage, edit and create queues	Existing Core Product	Queues can be created and workflow (documents and packages) can be assigned to specific queues manually by staff. Custom development for automated package / document handling would be required.

Examining	Administration	EXM6.2	<p>Ability for ACR to administer and define security rights and group roles for the following:</p> <ul style="list-style-type: none"> • Who can pull and process batches from specific queues • Who can examine batches and documents • Who can reject a batch • Who can reject a document • Who can cashier • Who can add and modify stamps and endorsements • Who can access the management screen • Who can access document search functionality • Who can access reports • Who can access the administration section • Staff member accounts • Document types • Account codes • Transfer Rate Areas (TRA) • Workflow mapping • Fee mapping • Rejection reasons 	Existing Core Product	Managers and Supervisors can be trained on Security Management roles and processes.
Examining	Reports	EXM7.1	<p>Ability to filter all reports by date range, document number and document type</p>	Existing Core Product	

Examining	Reports	EXM7.2	Ability for system to provide reports for the following data categories with all required data displayed: <ul style="list-style-type: none"> • Documents (submitted, recorded, rejected, deleted) • Batches (submitted, recorded, rejected) • Submitter • Staff member/examiner productivity (recorded, rejected batches and documents) • Document type • Charge account transactions 	Existing Core Product	EagleRecorder & EagleClerk have a large number of standard reports. Reports not currently available can be provided after the requirements are known. This applies to all the specific reports listed in EXM7.3-EXM7.7.
Examining	Reports	EXM7.3	Examiner Production Report	Existing Core Product	
Examining	Reports	EXM7.4	Monthly Summary Report	Existing Core Product	
Examining	Reports	EXM7.5	Document Source Total Count Report	Existing Core Product	
Examining	Reports	EXM7.6	Document Type Totals	Existing Core Product	
Examining	Reports	EXM7.7	E-Recording Daily County	Existing Core Product	
General	General	GEN1.1	Ability to edit and configure the following required global fields for Letter Head, Labels and Endorsements: Department Head Name, Office locations and Contact Information	Existing Core Product	

General	General	GEN1.10	Ability for staff member to minimize keystrokes by system providing for full range of copy, duplicate, reverse, etc. functionality between fields by utilizing hot keys	Existing Core Product	
General	General	GEN1.11	Ability for staff member to minimize keystrokes by system providing for full range of copy, duplicate, reverse, etc. functionality between documents by utilizing hot keys	Existing Core Product	
General	General	GEN1.15	Ability for the staff member to edit any and or all of the information captured by the ID card reader	Existing Core Product	
General	General	GEN1.16	Ability for the staff member to enter the information manually if the customer does not have a Driver's license or a State issued ID card or any US Govt. issued ID Card	Existing Core Product	
General	General	GEN1.17	Ability to flag all scanned documents into the following categories that include but are not limited to: Public, Confidential, Official and Supporting	Existing Core Product	
General	General	GEN1.18	Ability for categories of scanned documents to drive Image File Path, Retention schedule, Accessibility to customers and other business logics	Existing Core Product	
General	General	GEN1.19	All CARDS software functions must be in compliance with current California statutes	Existing Core Product	
General	General	GEN1.2	Ability to edit format and content of all letter and customer application form templates	Existing Core Product	

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General	General	GEN1.20	Ability to make certain fields mandatory for workflow and transactions in all modules	Existing Core Product	
General	General	GEN1.21	Ability for system to display/print all date type fields as MM/DD/YYYY (month/day/year) format by default, unless otherwise specified	Existing Core Product	
General	General	GEN1.22	Ability for system to display/print all time type fields in HH:MM:SS (hours/minutes/seconds) format by default, unless otherwise specified	Existing Core Product	
General	General	GEN1.23	All fields, where appropriate, must provide validation and input mask	Existing Core Product	
General	General	GEN1.24	Ability for system to alert staff member when field validation fails	Existing Core Product	
General	General	GEN1.25	Online and electronic manuals must be provided for each module and be maintained by vendor to reflect the current version of the CARDS software	Existing Core Product	
General	General	GEN1.26	All printed copies of official records and documents must be equivalent in appearance to the digital images displayed on the screen	Existing Core Product	
General	General	GEN1.28	All modules must have consistent and robust search capability	Existing Core Product	
General	General	GEN1.29	Search capability must include a keyword search, full or partial search, wildcard search, etc.	Existing Core Product	
General	General	GEN1.3	Ability to support and integrate electronic Signature Pads functionality	Existing Core Product	

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General	General	GEN1.30	Search utilities and search results must have the same visual and interactive functionality across all modules	Existing Core Product	
General	General	GEN1.31	Index Data and Image Data must be extractable to CD / DVD and be available for FTP	Existing Core Product	
General	General	GEN1.32	Ability for system to export images in various formats including: .TIF, .PDF/A, etc.	Existing Core Product	
General	General	GEN1.33	Ability for system to export data in various formats including: .XLS, .PDF, .DOC, .CSV, etc.	Existing Core Product	
General	General	GEN1.34	Any field in the database that receives incremental value shall be defined with enough positions to contain over a billion increments (e.g., receipt number must be at least ten (10) characters, which would give lowest value of 0000000001 and highest value of 9999999999)	Existing Core Product	
General	General	GEN1.4	Ability to capture and store electronic signatures/initials of staff member to be printed, as needed, on various forms, filings, registration cards, etc.	Existing Core Product	
General	General	GEN1.5	Ability to capture and store electronic signatures/initials of customers to be printed, as needed, on various forms, filings, registration cards, etc.	Existing Core Product	
General	General	GEN1.7	Ability to capture the source of all submissions and transactions, e.g. Counter, Mail, Online, Kiosk, Title	Existing Core Product	

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			Company, electronic, etc.		
General	General	GEN1.8	Ability for staff member to input notes for each transaction	Existing Core Product	
General	General	GEN1.9	Ability for staff member to search note fields	Existing Core Product	
General	Workflow	GEN2.1	Ability to define and configure steps in workflow processes	Existing Core Product	
General	Workflow	GEN2.2	Ability to define and configure workflow queues	Existing Core Product	
General	Workflow	GEN2.3	Ability for workflow to have the following actions that include but are not limited to: complete current task/start next task, reject current task/start next task, complete current task/exit, send to another staff member or holding queue etc.	Existing Core Product	
General	Workflow	GEN2.4	Ability for system to put the rejected tasks into a holding queue	Existing Core Product	
General	Workflow	GEN2.5	Ability for staff member to review and complete workflow tasks in holding queues	Existing Core Product	
General	Workflow	GEN2.6	Ability for the lead staff to have the option to assign one or more tasks to another staff member or queue	Existing Core Product	

General	Audit Trail	GEN3.1	<p>Ability to keep full audit trail of User Name, Date, Time and Workstation for the following:</p> <ul style="list-style-type: none"> • All workflow activities • Actions taken at the record level: • View • Add • Delete (Per retention schedule) • Disable • Enable • Print • Modifications done at the field level capturing before and after content • Versioning of images 	Existing Core Product	EagleRecorder has this ability. If images are stored in Documentum, Documentum would have to handle the versioning of images.
General	Audit Trail	GEN3.3	When viewing a record, its audit trail should be accessible to staff member with the appropriate security	Existing Core Product	
General	Admin/Security	GEN4.1	Ability to set security in system using roles or responsibilities that lead staff member can easily maintain	Existing Core Product	
General	Admin/Security	GEN4.2	Ability for system to restrict all staff members from altering the instrument numbers generated by system	Existing Core Product	
General	Admin/Security	GEN4.3	Ability to allow lead staff members to create and administer user/group security profiles through a user-friendly interface. The profiles will control user rights (View, Add, Modify, Disable, Enable, Delete) throughout the entire CARDS software, at a module, menu, function, field and report level	Existing Core Product	

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General	Admin/Security	GEN4.4	Lead staff members must have the ability to clone a user/group security profile when the need to add the same or similar profile arises	Existing Core Product	
General	Admin/Security	GEN4.5	Ability for system to provide a report that lists all user/group security profiles in system	Existing Core Product	EagleRecorder provides a Security Management module where all the users and the groups they are associate with are maintained.
General	Report	GEN5.1	Ability for staff member to generate reports on note fields	Existing Core Product	
General	Report	GEN5.10	Ability for system to generate detailed or summary versions for all reports including subtotals and grand total	Existing Core Product	
General	Report	GEN5.11	Ability to provide system-wide statistical and summary information for management. Information should include but is not limited to the following: workflow efficiency, individual production statistics, monetary transactions, database statistics related to application transactions, and system resource usage	Existing Core Product	EagleRecorder has statistical management reports. However, based on our experience, this will probably require one or more custom report focused on ACR's specific requirements.

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General	Report	GENS.12	Ability for staff member to concurrently work in the CARDS software while the report writer system is actively compiling or printing a report (e.g. No system driven "lock out")	Existing Core Product	
General	Report	GENS.13	Ability to print, export, email and/or save reports in .XLS, .PDF, .CSV formats	Existing Core Product	EagleRecorder supports PDF, HTML and CSV for most standard reports.
General	Report	GENS.14	Ability to define report properties such as email distribution list, report generation schedule/frequency, output format etc.	Existing Core Product	
General	Report	GENS.15	Ability for system to include the following on all reports: <ul style="list-style-type: none"> • Report Name • Selection/filter criteria • Run date/time • # of # pages 	Existing Core Product	
General	Report	GENS.2	Ability for system to allow an authorized user to customize standard reports	Existing Core Product	
General	Report	GENS.3	Ability for system to allow an authorized user to create user-defined production reports	Existing Core Product	
General	Report	GENS.4	Ability for staff member to easily generate ad-hoc (report wizard) reports	Existing Core Product	All reports are created using the internal report writer.

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General	Report	GEN5.5	Ability to view, order, sort, define print settings and print all reports	Existing Core Product	
General	Report	GEN5.6	When printing reports, users must be able to select the type of output, the printer, number of copies, and have the option to cancel the print request	Existing Core Product	
General	Report	GEN5.7	All reports must produce a selection criteria page, either at the beginning or the end of the report	Existing Core Product	
General	Report	GEN5.8	System must have the ability to generate, print, and produce all required reports on demand/real-time <ul style="list-style-type: none"> • to local printers • to network printers 	Existing Core Product	
General	Report	GEN5.9	Ability to produce reports at the Enterprise and/or office location(s) level	Existing Core Product	
Historical Conversion	Image Import	HST1.1	Ability to import images into system using the Document # or Book and Page as the image	Existing Core Product	
Historical Conversion	Image Import	HST1.2	Images will be single page TIF or PDF/A images	Existing Core Product	EagleRecorder can store images as single page TIF's or as PDF's / PDF/A's.
Historical Conversion	Image Import	HST1.3	Ability to configure the instrument # for older records that do not have instrument #s	Existing Core Product	
Historical Conversion	Image Import	HST1.4	Ability to create a record and attach image(s) to the record	Existing Core Product	

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Historical Conversion	Image Import	HST1.5	Ability to create workflow once image is imported into system	Existing Core Product	
Historical Conversion	Image Import	HST1.6	Ability to have the workflow steps configurable	Existing Core Product	
Historical Conversion	Image Import	HST1.7	The workflow steps should include, but not limited to, the following: <ul style="list-style-type: none"> • Image QC • Historical Index Write • Historical Index Verify 	Existing Core Product	
Historical Conversion	Image Import	HST1.8	Ability to have a reconciliation process for images imported	Existing Core Product	
Historical Conversion	QC Image Process	HST2.1	Ability to make the historical workflow process assessable within system with configurable security permissions	Existing Core Product	
Historical Conversion	QC Image Process	HST2.10	Ability to replace and scan into the record	Existing Core Product	
Historical Conversion	QC Image Process	HST2.2	Ability to present the documents most recent year first and then in chronological order within the year	Existing Core Product	
Historical Conversion	QC Image Process	HST2.3	Ability for staff member to configure the sorting sequence of the documents	Existing Core Product	
Historical Conversion	QC Image Process	HST2.4	Ability for staff member to accept/reject records from the QC Image workflow queue	Existing Core Product	
Historical Conversion	QC Image Process	HST2.5	Ability to push the accepted records to the next workflow step	Existing Core Product	
Historical Conversion	QC Image Process	HST2.6	Ability to transfer the rejected records into a Reject Preservation queue	Existing Core Product	

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Historical Conversion	QC Image Process	HST2.7	Ability for lead staff member to configure and manage the master list of rejection reasons through an administrative screen	Existing Core Product	
Historical Conversion	QC Image Process	HST2.8	Ability for staff member to enter the rejection reasons for the rejected records	Existing Core Product	
Historical Conversion	QC Image Process	HST2.9	Ability for lead staff member to establish a QC strategy to send only a certain percentage of documents to the QC Image Process based on business rules	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.1	Ability to place a group of historical records into the Historical Indexing workflow by book/page, or date, document type, etc.	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.10	Ability to make the "Originally recorded as" document type as well as the "Also Known As" document type searchable	Existing Core Product	EagleRecorder currently supports one document type for primary reporting purposes. A second document type can be entered into a historical document type field that can be searched.
Historical Conversion	Historical Indexing Workflow	HST3.11	Ability to support multiple grantor/grantee names per document	Existing Core Product	

Historical Conversion	Historical Indexing Workflow	HST3.12	Ability to provide staff member with an option for mouse, function key and command entries	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.13	Ability for only lead staff members to make modification to index fields once the record has been released to the customer	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.14	Ability to capture the field values before and after the change along with staff member who performed the change and with the date/time of modification	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.15	Ability for only lead staff member to assign any tasks in the index queues to assigned staff members	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.16	Ability for a staff member to forward a document to a lead staff member	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.17	Ability for a staff member to place a document in a holding queue	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.18	Ability to provide multiple verification options such as sight and re-key verification	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.19	Ability to accommodate 255 characters in the following fields that include but is not limited to: <ul style="list-style-type: none"> • Grantor / Grantee field • Child's AKA (Birth Certificate) • Decedent's AKA (Death Certificate) • First Person's AKA (Marriage Certificate) 	Existing Core Product	

				<ul style="list-style-type: none"> • Second Person's AKA (Marriage Certificate) 		
Historical Conversion	Historical Indexing Workflow	HST3.2	Ability for staff members to pick a document or group of documents from the work queue that requires indexing and/or verification	Existing Core Product		
Historical Conversion	Historical Indexing Workflow	HST3.20	Document Title field should be at minimum 100 characters in length	Existing Core Product		
Historical Conversion	Historical Indexing Workflow	HST3.21	Ability to reduce keystrokes and increase productivity by having a shortcut table where indexers only have to enter a code and system spells out the entire grantor or grantee name	Existing Core Product		
Historical Conversion	Historical Indexing Workflow	HST3.22	Ability to reduce keystrokes and increase productivity by having a shortcut table where indexers only have to enter a code and system spells out the entire document title name	Existing Core Product		
Historical Conversion	Historical Indexing Workflow	HST3.23	Ability for lead staff member to configure the shortcut tables	Existing Core Product		
Historical Conversion	Historical Indexing Workflow	HST3.24	Ability for a lead staff member to pull up all documents in a workflow queue and manage one or multiple documents	Existing Core Product		

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Historical Conversion	Historical Indexing Workflow	HST3.25	Ability for a lead staff member to manage workflow queues and viewing all tasks those are currently in that workflow step (Transfer Tax, Write, Verify)	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.27	Ability to have the Indexer staff member name as an additional sort column for the Verify workflow queue	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.28	Ability for lead staff member to assign one or more tasks to a staff member in all workflow queues	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.29	Ability for lead staff member to assign one or more tasks to a queue in all workflow queues	Existing Core Product	

Historical Conversion	Historical Indexing Workflow	HST3.3	<p>Ability for the system to support indexing of the following:</p> <ul style="list-style-type: none"> • Document Number • Document Code • Document Title Name • Grantor • Grantee • Recording Date • Recording Time • Number of Pages • Book • Page • Assessor's Parcel Number • Legal Description • Property Address • Property City • Link to Associated Documents 	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.30	<p>Ability for staff member, for the Verify workflow queue, to select one or more tasks and marking them as verified and completing the workflow step, assigning lead staff member staff members name and date as the individual who verified it through the Manage Workflow queuing</p>	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.31	<p>Ability to manage additional titles on documents</p>	Existing Core Product	
Historical Conversion	Historical Indexing	HST3.33	<p>All workflow history, receipting information and images should be</p>	Existing Core Product	

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	Workflow		linked to the header record of the document		
Historical Conversion	Historical Indexing Workflow	HST3.34	Ability for staff member to view what was keyed in Write versus Verify when there are differences between the two	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.4	Ability for staff member to correct any indexing errors found	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.5	Ability for lead staff members to select which fields are required to be re-keyed	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.6	Ability only for lead staff members to make modifications to fields once the document has been marked Index Verified	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.7	Ability only for lead staff members to have the ability to modify a staff member's security profile to allow for making corrections on documents	Existing Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.8	The verifying screen must look the same as the indexing screen	Existing Core Product	

Historical Conversion	Historical Indexing Workflow	HST3.9	Ability to support indexing the "Originally recorded as" document type as well as the "Also Known As" document type	Existing Core Product	EagleRecorder currently supports one document type for primary reporting purposes. A second document type can be entered into a historical document type field that can be searched.
Historical Conversion	Release to Public	HST4.1	Ability to release a group of official records by either year or by book (or book and book type), depending on timeframe being released. Should be a similar process to how current day is advanced	Existing Core Product	
Historical Conversion	Reports	HST6.1	Historical indexing reports should mirror production indexing reports	Existing Core Product	
Historical Conversion	Reports	HST6.2	Reconciliation reports for the images imported to ensure there are no missing images and/or documents	Existing Core Product	
Indexing	Official Records	IND1.1	Ability for staff members to select a document from the work queue that requires indexing and/or verification	Existing Core Product	
Indexing	Official Records	IND1.10	Ability to provide staff members with an option for mouse function, function key and command entries	Existing Core Product	
Indexing	Official Records	IND1.11	Ability to allow only a lead staff member to modify index fields after the day has been advanced	Existing Core Product	

Indexing	Official Records	IND1.12	Ability for the system to capture the 'Change after day has been advanced Date' and the 'User changed after day has been advanced' for the official records that are updated anytime after the respective Day has been advanced for those records	Existing Core Product	
Indexing	Official Records	IND1.16	Ability for lead staff members to assign any task in the index queues to another staff members	Existing Core Product	
Indexing	Official Records	IND1.17	Ability for staff members to forward a document to a lead staff member	Existing Core Product	
Indexing	Official Records	IND1.18	Ability for staff members to place a document in a holding queue	Existing Core Product	
Indexing	Official Records	IND1.19	Ability to provide multiple verification options such as sight and re-key verification.	Existing Core Product	
Indexing	Official Records	IND1.2	<p>System shall support indexing of the following:</p> <ul style="list-style-type: none"> • Document Number • Document Code • Document Title Name • Grantor(s) (Unlimited) • Grantee(s) (Unlimited) • Recording Date • Recording Time • Number of Pages • Book • Page • Assessor's Parcel Number (Unlimited) • Legal Description - Formatted Legal Description • Legal Description - Meets and Bounds • Property Address • Property City • Link to Associated Documents 	Existing Core Product	

Indexing	Official Records	IND1.20	Ability to accommodate 255 characters in the following fields that include but is not limited to: <ul style="list-style-type: none"> • Grantor / Grantee field • Child's AKA (Birth Certificate) • Decedent's AKA (Death Certificate) • First Person's AKA (Marriage Certificate) • Second Person's AKA (Marriage Certificate) 	Existing Core Product	
Indexing	Official Records	IND1.21	Ability to populate the entire Grantor / Grantee name, while indexer only types in a code (to reduce keystrokes and increase productivity by having a shortcut table)	Existing Core Product	
Indexing	Official Records	IND1.22	Ability to populate the entire document title name, while indexer only types in a code (to reduce keystrokes and increase productivity by having a shortcut table)	Existing Core Product	
Indexing	Official Records	IND1.23	Ability for a lead staff member to manage workflow queues	Existing Core Product	
Indexing	Official Records	IND1.24	Ability for a lead staff member to view all tasks that are currently in workflow steps (Transfer Tax, Write, Verify)	Existing Core Product	
Indexing	Official Records	IND1.26	Ability for lead staff member to have the option of selecting one or more tasks in the Verify workflow queue	Existing Core Product	
Indexing	Official Records	IND1.27	Ability for lead staff member to mark tasks as verified and complete the workflow step	Existing Core Product	

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Indexing	Official Records	IND1.28	Ability to update the task with lead staff member name and date as the individual who verified it	Existing Core Product	
Indexing	Official Records	IND1.29	Ability for staff members to manage additional titles on the multiple-title documents	Existing Core Product	
Indexing	Official Records	IND1.3	Ability for staff members to correct any indexing errors	Existing Core Product	
Indexing	Official Records	IND1.31	Ability for staff members to delete all sequences and insert sequences numbers on the documents that were examined and feed incorrectly or written incorrectly	Existing Core Product	
Indexing	Official Records	IND1.32	Ability to link all the workflow history, the receipting information and the images to the header record of the document	Existing Core Product	Unlike <i>CRIS+plus</i> , there is not a header recorder in a multi-title document. All receipting, audit and workflow history is associated with each document but not as a "header" record.

Indexing	Official Records	IND1.33	Ability for staff members to view what was keyed in 'Write' workflow step versus 'Verify' workflow step when there are differences between the two	Existing Core Product	EagleRecorder allows the Verifier to see what the Indexer has entered if there is a discrepancy between the two. The Audit Module will show both entries.
Indexing	Official Records	IND1.34	Ability for staff members to configure Digital and/or digitized Electronic recording documents to bypass the Write workflow queue	Existing Core Product	
Indexing	Official Records	IND1.35	Documents must be linked by direct reference to indexed data such as Grantor/Grantee Name, Instrument Number, Recorded Date, etc.	Existing Core Product	
Indexing	Official Records	IND1.4	Ability for lead staff members to select which fields are required to be re-keyed	Existing Core Product	
Indexing	Official Records	IND1.5	Ability to allow only a lead staff member to make modifications to fields once the document has completed the Indexing Verification workflow step	Existing Core Product	
Indexing	Official Records	IND1.6	Ability to capture the modifications to fields once the document has completed the Indexing Verification workflow step	Existing Core Product	
Indexing	Official Records	IND1.7	Ability for lead staff members to modify a staff member's security profile giving them the ability to make	Existing Core Product	

			corrections on documents		
Indexing	Official Records	IND1.8	The verify data entry screen must look the same as the write data entry screen	Existing Core Product	
Indexing	Official Records	IND1.9	Ability to support multiple grantor/grantee names per document	Existing Core Product	
Indexing	Reports - Confidential Marriage	IND10.1	Document Summary - Provides the start and ending Local Registration Number (LRN) of all Confidential Marriages receipted for a particular day and a total count for the day	Existing Core Product	
Indexing	Reports - Confidential Marriage	IND10.2	Keystroke Productivity Report - Provides each Indexer's write and verify totals, the type of task (write or verify), error and omission totals and the total time spent for a specific day	Existing Core Product	
Indexing	Reports - Confidential Marriage	IND10.3	Confidential Marriage Outstanding Workflow Tasks - Indicates how many tasks are left to verify before advancing proof date	Existing Core Product	
Indexing	Reports - Confidential Marriage	IND10.4	Confidential Marriage Incorrect Document Code - Indicates errors in the document code field	Existing Core Product	
Indexing	Reports - Confidential Marriage	IND10.5	Confidential Marriage Weekly Amendments - Lists confidential marriage amendments in chronological order, gives the amendment count and allows us to check for indexing errors	Existing Core Product	

Indexing	Reports - Historical SSN Redaction	IND11.1	Redaction process statistics - The reports should include the number of images scanned, the number of images redacted, the number of social security numbers redacted as well as the confidence level.	Existing Core Product	EagleRecorder has statistical management reports. However, based on our experience, this will probably require one or more custom report focused on ACR's specific requirements.
Indexing	Reports - Historical SSN Redaction	IND11.2	Documents redacted - Provides the Date range and the document #s redacted	Existing Core Product	
Indexing	Vitals	IND2.1	Ability to have Write and Verify workflow queues for the 'Birth' vitals	Existing Core Product	
Indexing	Vitals	IND2.10	Ability for staff members to enter a book and page for the delayed vitals	Existing Core Product	
Indexing	Vitals	IND2.2	Ability to have Write and Verify workflow queues for the 'Death' vitals	Existing Core Product	
Indexing	Vitals	IND2.3	Ability to have Write and Verify workflow queues for the 'Marriage' vitals	Existing Core Product	
Indexing	Vitals	IND2.4	Ability to define security for Confidential Marriage workflow	Existing Core Product	

Indexing	Vitals	IND2.5	Ability to store and process the following info for regular Birth vitals: <ul style="list-style-type: none"> • Local Registration Number (LRN) • Roll Number • Certificate Number • Date Processed • Time Processed • Document Code • Document Type Name • Number of Pages • Child's Last Name • Child's First Name • Child's Middle Name • Child's Suffix • Child's AKA • Gender • Date of Birth • Birth City • Type of Birth (Regular, Adopted, Delayed) • Deceased Indicator (Y/N) • Amendment Date • Remarks • Mother's Last Name • Mother's First Name • Mother's Middle Name • Mother's Suffix • Mother's AKA • Father's Last Name • Father's First Name • Father's Middle Name • Father's Suffix • Father's AKA 	Existing Core Product	

Indexing	Vitals	IND2.6	Ability to store and process the following info for the regular Death Vitals: <ul style="list-style-type: none"> • Local Registration Number (LRN) • Roll Number • Certificate Number • Date Processed • Time Processed • Document Code • Document Type Name • Number of Pages • Decedent's Last Name • Decedent's First Name • Decedent's Middle Name • Decedent's Suffix • Decedent's AKA • Date of Birth • Date of Death • City of Death • Amendment Date • Remarks 	Existing Core Product	

Indexing	Vitals	IND2.7	Ability to store and process the following info for the regular and Confidential Marriage Vitals:	Existing Core Product	
			<ul style="list-style-type: none"> • Local Registration Number (LRN) • Roll Number • Certificate Number • Date Processed • Time Processed • Document Code • Document Type Name • Number of Pages • First Person's Last Name • First Person's First Name • First Person's Middle Name • First Person's Suffix • First Person's AKA • First Person's Last Name at Birth • First Person's New Middle Name • First Person's New Last Name • Second Person's Last Name • Second Person's First Name • Second Person's Middle Name • Second Person's Suffix • Second Person's AKA • Second Person's Last Name at Birth • Second Person's New Middle Name • Second Person's New Last Name • Marriage Date • Amendment Date • Remarks 		

Indexing	Vitals	IND2.8	Ability for system to maintain unique Document Codes for <ul style="list-style-type: none"> • Confidential Marriage • Regular Marriage • Death • Birth 	Existing Core Product	
Indexing	Vitals	IND2.9	Ability for staff members to enter an LRN# for the delayed vitals	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.1	Ability for system to hide the Preliminary 20 Day Notices from the public viewing	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.10	Ability to display the images of the Preliminary 20 Day Notice and the matched Notice of Completion (or other configured document types)	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.11	Ability for staff members to review the documents and decide whether it is a 'Match' or 'No Match'	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.12	Ability to return the Preliminary 20 Day Notice to the outstanding queue in case of a 'No Match'	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.13	Ability to regenerate a Letter Sent Date in system in case of a 'Match'	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.14	Ability for staff members to view the Letter Sent Date when the Preliminary 20 Day Notice record is retrieved	Existing Core Product	

Indexing	Preliminary 20 Day Notices	IND3.15	Ability to print out a predefined letter with the following information: From the Preliminary 20 Day Notice - legal description, Grantor and Grantee From the Notice of Completion (or other configured document types - Document #, Document Type Name, Recording Date and Grantor Name	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.16	Ability to retain an image of the letter that can be viewed through the record and reprinted, if necessary	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.17	Ability to record the date, time and the name of staff member who completed the workflow task	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.18	Ability to display the date, time and the name of staff member who completed the workflow task on the record	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.19	Ability to define the retention timeframe for the letter	Existing Core Product	EagleRecorder has the ability to purge documents based on date and document type.
Indexing	Preliminary 20 Day Notices	IND3.2	Ability to store and process the following info (3.3.2 In addition to the normal fields that are indexed on Official Records) for the Preliminary 20 Day Notices: <ul style="list-style-type: none"> • Claimant Name • Claimant Mailing Address • Claimant Mailing City • Claimant Mailing State 	Existing Core Product	

			<ul style="list-style-type: none"> • Claimant Mailing Zip code 		
Indexing	Preliminary 20 Day Notices	IND3.20	Ability to purge the letter based on the defined retention timeframe. The countdown begins once the letter is mailed	Existing Core Product	EagleRecorder has the ability to purge documents based on date and document type.
Indexing	Preliminary 20 Day Notices	IND3.3	Ability for system to process the Preliminary 20 Day Notices in a separate workflow queue	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.5	Ability to display the property city	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.6	Ability not to eliminate it from being a match on a one to one matching on property city	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.7	Ability to put the document on the Preliminary 20 Day Notice queue for review, once a match is found	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.8	Ability for staff members to pull the document from the queue	Existing Core Product	
Indexing	Preliminary 20 Day Notices	IND3.9	Ability to display the indexed information on the Preliminary 20 Day Notice, and the matched Notice of Completion (or other configured	Existing Core Product	

			document types) along with the images of both documents		
Indexing	OCR	IND4.1	Ability for the OCR system to extract recording information such as grantor(s), grantee(s), legal description, related documents, return to address and other data fields irrespective of where the information resides in document	Existing Core Product	EagleRecorder's OCR system supports extracting data from many fields. Extracting legal descriptions is typically not done, because of the various ways legal descriptions can be formatted.
Indexing	OCR	IND4.2	Ability to present the document information and corresponding image to staff member for verification after the OCR Indexing step	Existing Core Product	
Indexing	OCR	IND4.3	Ability to highlight the areas in the document where the information was extracted from	Existing Core Product	
Indexing	OCR	IND4.4	Ability for staff members to configure the highlight color	Existing Core Product	
Indexing	OCR	IND4.5	Ability to extract data directly from the document	Existing Core Product	
Indexing	OCR	IND4.6	Ability for staff members to approve the data extracted by OCR system	Existing Core Product	
Indexing	OCR	IND4.7	Ability for staff members to enter the data manually into system	Existing Core Product	

Indexing	OCR	IND4.8	Ability for staff members to "copy/paste or rubber band" the data from the image to the index fields	Existing Core Product	
Indexing	OCR	IND4.9	Ability to differentiate between corporation/organization names vs. individual names and index appropriately without staff member intervention	Existing Core Product	
Indexing	SSN Redaction - Current Day	IND5.1	Ability to examine documents for social security numbers	Existing Core Product	
Indexing	SSN Redaction - Current Day	IND5.10	Ability to reposition the annotation	Existing Core Product	
Indexing	SSN Redaction - Current Day	IND5.11	Ability to capture the name of staff member who redacted the image	Existing Core Product	
Indexing	SSN Redaction - Current Day	IND5.12	Ability to capture the date, time and the XY coordinates of the redaction for each document redacted	Existing Core Product	
Indexing	SSN Redaction - Current Day	IND5.14	Ability to make the redacted images available in the system	Existing Core Product	
Indexing	SSN Redaction - Current Day	IND5.2	Ability to provide redaction functionalities	Existing Core Product	
Indexing	SSN Redaction - Current Day	IND5.3	Ability to redact the SSN automatically	Existing Core Product	
Indexing	SSN Redaction - Current Day	IND5.4	Ability to highlight the area that is to be redacted in red	Existing Core Product	
Indexing	SSN Redaction - Current Day	IND5.5	Ability to verify the area, delete and/or move the redaction as necessary	Existing Core Product	
Indexing	SSN Redaction - Current Day	IND5.6	Ability to perform "rubber-banding" redaction manually	Existing Core Product	

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Indexing	SSN Redaction - Current Day	IND5.8	Ability to put an annotation, with the words "Public Record", placed on the public record images	Existing Core Product	A watermark or annotation can be placed on all images.
Indexing	SSN Redaction - Current Day	IND5.9	Ability to place the annotation over the Recorder's label, which is in the top right section of the first page of the document	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.1	Ability to examine the images of the historical documents for social security number redaction (the images are stored in single page, monochrome, group IV TIFF documents)	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.10	Ability to place the redacted documents into an SSN Historical QA workflow	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.11	Ability for staff members to verify the OCR redaction of the redacted documents in the SSN Historical QA workflow	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.12	Ability for staff members to perform "rubber-banding" redaction in the redacted documents in the SSN Historical QA workflow	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.13	Ability for staff members member to remove system generated redaction from the redacted documents in the SSN Historical QA workflow	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.14	Ability for staff members to complete the workflow step in the SSN Historical QA workflow	Existing Core Product	

Indexing	SSN Redaction - Historical	IND6.15	Ability to allow multiple staff members to access and work in the Historical SSN QA workflow queue simultaneously	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.16	Ability to put a watermark, with the words "Public Record", placed on the public record images	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.17	Ability to place the annotation over the Recorder's label, which is in the top right section of the first page of the document	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.18	Ability for staff members to reposition the annotation	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.2	Ability to examine the images of the historical documents in a batch process	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.21	Ability to make the redacted images available in the system	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.22	Ability to maintain the file naming convention according to the naming of the production images	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.23	Ability to replace the original image by the redacted version within the primary image repository	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.24	Ability to maintain all of the properties and characteristics of the images with the exception of the redaction and the watermark	Existing Core Product	Currently part of EagleRecorder, this may depend upon Documentum's capabilities.

Indexing	SSN Redaction - Historical	IND6.3	Ability for staff members to select a range of documents to be selected for redaction using a multitude of options, including: <ul style="list-style-type: none"> • Beginning and ending recording date • AND Document Type Name(s) • OR Document number 	Existing Core Product	Documents can be selected for redaction workflow using normal search functionality.
Indexing	SSN Redaction - Historical	IND6.4	Ability for staff members to define the time for the system to begin searching the images in the image database	Existing Core Product	We assume this means "define the date and time".
Indexing	SSN Redaction - Historical	IND6.5	Ability to redact the Social Security Numbers in the documents	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.7	Ability to keep track of the documents that have already been processed for redaction by the system	Existing Core Product	
Indexing	SSN Redaction - Historical	IND6.9	Ability to provide option to staff members to re-process the documents for redaction	Existing Core Product	
Indexing	SSN Redaction - Unredacted SSN Retrieval	IND7.1	Ability for staff members with appropriate rights access to query/search, view and print the official records with SSN	Existing Core Product	

Indexing	SSN Redaction - Unredacted SSN Retrieval	IND7.2	Ability for staff members to utilize WebTop to drill down to the appropriate folder and retrieve the unredacted image	Existing Core Product	Assuming this is in reference to Documentum's Webtop, it is a separate application provided by Documentum to drill down into Documentum repositories, and is not supplied by Tyler.
Indexing	SSN Redaction - Unredacted SSN Retrieval	IND7.3	Ability for system to ask for 'Delete Confirmation' if a staff member wants to delete a document	Existing Core Product	
Indexing	SSN Redaction - Unredacted SSN Retrieval	IND7.4	Ability for staff members to delete a document with the delete confirmation	Existing Core Product	
Indexing	SSN Redaction - Unredacted SSN Retrieval	IND7.5	Ability to delete the document and indexes upon confirmation for deletion	Existing Core Product	
Indexing	SSN Redaction - Unredacted SSN Retrieval	IND7.6	Ability to create a log for document deletion capturing staff member, date, time and document # that was deleted	Existing Core Product	EagleRecorder supports this through audit history but this will depend upon the integration with Documentum.

Indexing	Reports - Official Records	IND8.1	Daily Document Summary - Provides the start and ending number of all Historical, Official Records and Preliminary 20-Day Notices recorded for a particular day and a total document count for the day	Existing Core Product	
Indexing	Reports - Official Records	IND8.11	Missing Grantor/Grantee - Indicates documents that are missing the grantor and the grantee	Existing Core Product	
Indexing	Reports - Official Records	IND8.12	Remarks Review - Checks for information that should not appear in the remarks field	Existing Core Product	EagleRecorder can verify from a pick or look-up list; however, if free-form data is desired in this field, having a meaningful validator on it would require custom development.
Indexing	Reports - Official Records	IND8.13	Error Report - Indicates errors and omissions given to the write staff member from the verify staff member	Existing Core Product	
Indexing	Reports - Official Records	IND8.2	Keystroke Productivity Report - Provides each Indexer's write and verify totals, the type of task (write or verify), error and omission totals and the total time spent for a specific day	Existing Core Product	

Indexing	Reports - Official Records	IND8.3	Tasks Left in Workflow - Indicates how many tasks are left to write before advancing proof date	Existing Core Product	EagleRecorder provides a pop-up listing all remaining tasks as part of the advance proof date process.
Indexing	Reports - Official Records	IND8.5	Satellite Office Errors with Remarks - Lists all satellite office Examiner errors given by the Indexing section	Existing Core Product	
Indexing	Reports - Official Records	IND8.6	Examiner - Errors QC by Indexing - Lists all Gateway Examiner errors given by the Indexing section	Existing Core Product	
Indexing	Reports - Official Records	IND8.7	Doc Code Occurrences - Indicates errors in the document code field	Existing Core Product	Only supported document codes can be entered or converted so it is doubtful that an error in the document code field can occur. Having said that, a user defined report can be created to find any non-standard document codes.

Indexing	Reports - Official Records	IND8.8	Finding "YY" and Other Special Characters - Indicates "Yy" and other special characters that should not appear in the grantor/grantee fields	Existing Core Product	We believe this is an issue with CRIS+plus but we can easily provide a utility or report to search for special characters.
Indexing	Reports - Official Records	IND8.9	Map Book and Page Review - Shows type of map and book and page assigned to each map recorded	Existing Core Product	
Indexing	Reports - Vital Records	IND9.1	Document Summary - Provides the start and ending Local Registration Number (LRN) of all Vital Records receipted for a particular day and a total vital count for the day	Existing Core Product	
Indexing	Reports - Vital Records	IND9.2	Keystroke Productivity Report - Provides each Indexer's write and verify totals, the type of task (write or verify), error and omission totals and the total time spent for a specific day	Existing Core Product	
Indexing	Reports - Vital Records	IND9.3	Vitals Outstanding Workflow - Indicates how many tasks are left to verify before advancing proof date	Existing Core Product	
Indexing	Reports - Vital Records	IND9.4	Incorrect Document Codes - Indicates errors in the document code field	Existing Core Product	

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Indexing	Reports - Vital Records	IND9.5	Incorrect Roll # or Type - Identifies format issues with the roll # or type	Existing Core Product	EagleRecorder can verify from a pick or look-up list; however, if free-form data is desired in this field, having a meaningful validator on it would require custom development.
Indexing	Reports - Vital Records	IND9.6	Weekly Amendment List - Lists amendments in chronological order, gives the amendment count and allows us to check for indexing errors	Existing Core Product	
IT Security & Infrastructure	Network Infrastructure	ITS1.1	Identify the server bandwidth requirements	Existing Core Product	1GB network connection recommended
IT Security & Infrastructure	Network Infrastructure	ITS1.2	Identify the client bandwidth requirements to connect to remote offices	Existing Core Product	Bandwidth requirements are based on the number of clients at remote site and can be identified during the implementation phase.
IT Security & Infrastructure	Documentum Configuration & Migration	ITS10.1	System must demonstrate acceptable response times with 500 staff members simultaneously using system across 7 locations	Existing Core Product	

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IT Security & Infrastructure	Documentum Configuration & Migration	ITS10.2	Database: All tables, views, stored procedures and triggers must be configured for optimal staff member performance	Existing Core Product	
IT Security & Infrastructure	Documentum Configuration & Migration	ITS10.3	Any customer websites or internal websites must demonstrate acceptable response times	Existing Core Product	
IT Security & Infrastructure	Documentum Configuration & Migration	ITS10.4	Webserver must be configured for optimal staff member performance	Existing Core Product	
IT Security & Infrastructure	Documentum Configuration & Migration	ITS10.5	System should be able to meet performance requirements as demand increases	Existing Core Product	
IT Security & Infrastructure	Documentum Configuration & Migration	ITS10.6	The image capture component of the application should allow the full performance of the existing high speed scanners in production	Existing Core Product	This will be a function of the scanner and PC. Quad core scanning workstations with a minimum of 4GB's of RAM are recommended to achieve full scanner performance.
IT Security & Infrastructure	Disaster Recovery	ITS11.1	Application must support High Availability and Disaster Recovery Plan across network for two offices	Existing Core Product	This will be based on customer configuration of application and database servers and/or Tyler's Disaster Recovery

						services.
IT Security & Infrastructure	Miscellaneous	ITS12.1	In addition to the production environment, there shall be at least one persistent test environment and at least one persistent training environment at the primary and/or secondary data center. The application shall clearly display in the title bar which database is being accessed (i.e., production, training, or test)	Existing Core Product		
IT Security & Infrastructure	Reporting	ITS12.2	Any application code/library used to interface with 3rd party middleware and/or enterprise applications (e.g. Documentum) should be configured and supported by the vendor	Existing Core Product		
IT Security & Infrastructure	Reporting	ITS13.1	Preferred method of reporting is Microsoft SQL Server Reporting Services, if not, vendor to propose acceptable web based reporting server tool	Existing Core Product		
IT Security & Infrastructure	System Security	ITS2.1	Follow all County of Riverside Security Procedures found in Policy A58	Existing Core Product		
IT Security & Infrastructure	System Security	ITS2.2	Ability to keep audit trails of all transactions throughout system	Existing Core Product		

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IT Security & Infrastructure	System Security	ITS2.3	Ability for the system to be single sign on with role based security is preferred	Existing Core Product	
IT Security & Infrastructure	System Security	ITS2.4	Ability to configure systems to either use Microsoft Active Directory (preferred) or use a staff member name / Password login	Existing Core Product	
IT Security & Infrastructure	System Security	ITS2.5	<p>If Passwords are not integrated within Active Directory:</p> <ul style="list-style-type: none"> • Ability to provide multiple levels of password security with identification of the specific staff member executing a transaction and lockout to prevent unauthorized fees, deletions, and searches • Ability to allow staff member to change their password • Provide ability to view online system Security in order to perform periodic audits to determine if security set up is still in line with staff member-defined guidelines and principles • The system security provides the ability to manage password policies based on aging minimum number of characters, reuse of passwords and complexity (mix of letters, numbers and special characters) • Security modules allow ability to quickly deactivate a staff member and to reactivate a staff member • Automatic staff member ID lockout and Automatic reporting of more than 	Existing Core Product	Passwords are integrated with Active Directory.

			<p>three (3)-attempted accesses with incorrect password</p> <ul style="list-style-type: none"> • Security Administrator can determine the last time that a particular staff member ID accessed system as well as which workstation was used 		
IT Security & Infrastructure	System Security	ITS2.6	Ability to set security in system using roles and responsibilities	Existing Core Product	
IT Security & Infrastructure	System Security	ITS2.7	Ability for staff members to easily maintain the roles and responsibilities	Existing Core Product	

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IT Security & Infrastructure	System Security	ITS2.8	Any vulnerability discovered in Security Audits must be corrected in accordance with County Security Policy A58	Existing Core Product	
IT Security & Infrastructure	System Security	ITS2.9	staff members must be unable to alter instrument numbers generated by system	Existing Core Product	
IT Security & Infrastructure	Hardware	ITS3.1	Ability to be supported on WinTel platforms	Existing Core Product	Tyler is a Microsoft Certified Partner
IT Security & Infrastructure	Hardware	ITS3.11	Ability to be compatible with the Cash Drawers with USB 2.0 and above	Existing Core Product	
IT Security & Infrastructure	Hardware	ITS3.12	Ability to be compatible with the Printers/Receipt and Label printers with USB 2.0 and above	Existing Core Product	
IT Security & Infrastructure	Hardware	ITS3.13	Ability to be compatible with the Wand Scanners with USB 2.0 and above	Existing Core Product	
IT Security & Infrastructure	Hardware	ITS3.2	Ability to support redundancy on nics, drives, HBAs etc.	Existing Core Product	
IT Security & Infrastructure	Hardware	ITS3.3	Ability to be compatible with a virtualized environment	Existing Core Product	Supported Virtual must meet Tyler virtualized specifications
IT Security & Infrastructure	Hardware	ITS3.4	Ability to store all data on SAN	Existing Core Product	
IT Security & Infrastructure	Hardware	ITS3.5	Ability to support dual monitor	Existing Core Product	
IT Security & Infrastructure	Hardware	ITS3.6	Minimum monitor resolution should be 1024 x 768	Existing Core Product	

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IT Security & Infrastructure	Hardware	ITS3.7	Ability to be compatible with: <ul style="list-style-type: none"> • USB 2.0 and above • Kodak 1840 scanners (SCSI) • Fujitsu 5750c scanners (SCSI) • Fujitsu 6770c scanners (SCSI) 	Existing Core Product	
IT Security & Infrastructure	Hardware	ITS3.8	Ability to support ADF and flatbed scanners	Existing Core Product	
IT Security & Infrastructure	Hardware	ITS3.9	Ability to support a minimum of scanning 60 pages per minute	Existing Core Product	This will be a function of the scanner and PC. Quad core scanning workstations are recommended to achieve maximum throughput.
IT Security & Infrastructure	Software	ITS4.1	The proposed solution shall support redundant and load-balanced applications, database, and web server environments	Existing Core Product	
IT Security & Infrastructure	Software	ITS4.10	The proposed solution must provide for at least two types of client interfaces. There will be a locked down customer kiosk build with only customer facing functions. There will also be a staff member build which is able to perform all functions, subject to staff member role(s) and assuming required peripherals are attached	Existing Core Product	

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IT Security & Infrastructure	Software	ITS4.11	The proposed solution must allow staff member to log on to any workstation which is set up for the application	Existing Core Product	
IT Security & Infrastructure	Software	ITS4.2	The proposed solution shall be compatible with a virtualized environment, specifically VMware ESXi4.1 and above	Existing Core Product	
IT Security & Infrastructure	Software	ITS4.3	If server is a physical server, the operating system must be Windows 2008 R2 and above	Existing Core Product	
IT Security & Infrastructure	Software	ITS4.4	If server is a virtual server, the operating system must be Windows 2008 R2 and above	Existing Core Product	
IT Security & Infrastructure	Software	ITS4.5	Work Stations must be compatible with 32 and 64 bit operating systems	Existing Core Product	
IT Security & Infrastructure	Software	ITS4.6	Work Stations must be compatible with Windows 7 and above	Existing Core Product	
IT Security & Infrastructure	Software	ITS4.7	The proposed solution must support the capability to have multiple other applications open concurrently	Existing Core Product	
IT Security & Infrastructure	Software	ITS4.8	The proposed solution must not require staff members to have administrator rights on their workstations in order to run applications	Existing Core Product	
IT Security & Infrastructure	Software	ITS4.9	Any application components, including browser plug-ins, requiring desktop installation, MSIs must be able to be installed and deployed centrally	Existing Core Product	
IT Security & Infrastructure	Database	ITSS.1	Preferred Database is the latest version of MS SQL Server	Existing Core Product	MS SQL Server is Tyler's preferred

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						database.
IT Security & Infrastructure	Websites	ITS6.2	Websites need to be compatible with Windows Server 2008 R2 or higher	Existing Core Product		
IT Security & Infrastructure	Websites	ITS6.3	Preferred Web environment is IIS	Existing Core Product		
IT Security & Infrastructure	Websites	ITS6.4	Web-enabled applications can be accessed using Internet Explorer 8.0 or higher and Safari and Firefox 4.x and higher	Existing Core Product		
IT Security & Infrastructure	Maintenance & Support	ITS7.2	Vendor must provide on-call support for after hours	Existing Core Product		
IT Security & Infrastructure	Maintenance & Support	ITS7.3	Vendor is available with prior notice for after hours and weekend support	Existing Core Product		
IT Security & Infrastructure	Maintenance & Support	ITS7.4	Vendor shall have a tracking system online that is available to staff members for entering support tickets	Existing Core Product		
IT Security & Infrastructure	Data Conversion	ITS8.1	Vendor will be responsible for data transformation and loading data into new system	Existing Core Product	Data and images will be converted per Tyler's standard conversion process.	
IT Security & Infrastructure	Data Conversion	ITS8.3	Vendor will analyze and document the conversion scope, objectives, approach, requirements and the strategy for how the conversion will be performed	Existing Core Product		
IT Security & Infrastructure	Data Conversion	ITS8.4	Vendor will document the standards that should be followed throughout the conversion process	Existing Core Product		

IT Security & Infrastructure	Data Conversion	ITS8.5	Vendor will map legacy data files and elements to the new database tables and columns. This map includes an explanation of business, translation, foreign key rules and default settings	Existing Core Product	We currently map data per our standard CRIS conversion but do not have it documented in writing outside of code which tables in CRIS map to tables in EagleRecorder.
IT Security & Infrastructure	Data Conversion	ITS8.6	Vendor will be responsible for writing validation tests cases and scripts	Existing Core Product	
IT Security & Infrastructure	Data Conversion	ITS8.7	Vendor will test how the converted data performs within the new application	Existing Core Product	
IT Security & Infrastructure	Data Conversion	ITS8.8	Vendor will convert data that has been verified by staff members before commencement of production operations	Existing Core Product	
IT Security & Infrastructure	Documentum Configuration & Migration	ITS9.4	Preferred image capture software is InputAccel/Captiva	Existing Core Product	EagleRecorder/Eagle Clerk uses the Morena driver for scanning, Java Imaging and the Java Advanced Imaging libraries for image manipulation.
Preservation	Microfilming - Official Records	PRV1.1	Ability for staff members to export images daily to send to 16mm microfilm (either export unredacted	Existing Core Product	

			'Official Records' or redacted 'Public Records')		
Preservation	Microfilming - Official Records	PRV1.10	Exported documents should be identified in such a way that the first page of each document is uniquely marked to allow for a medium blip	Existing Core Product	Images can be tagged as first or subsequent pages for the Archive Writer.
Preservation	Microfilming - Official Records	PRV1.11	Exported documents should be identified in such a way that subsequent pages are marked differently than first page of document to allow for a small blip	Existing Core Product	Images can be tagged as first or subsequent pages for the Archive Writer.
Preservation	Microfilming - Official Records	PRV1.2	Ability for staff members to specify a date in order to select the document images for exporting	Existing Core Product	
Preservation	Microfilming - Official Records	PRV1.3	Ability for staff members to export images to a local machine in order to run the images to microfilm	Existing Core Product	
Preservation	Microfilming - Official Records	PRV1.4	Ability for system to rotate images to comic orientation	Existing Core Product	
Preservation	Microfilming - Official Records	PRV1.5	Must be compatible with Kodak Archive Writer 9620 and Kodak Archive Writer 4800 and/or Fuji Archive Writer	Existing Core Product	Images stored and retrieved from EagleRecorder are compatible with Kodak Archive Writers.
Preservation	Microfilming - Official Records	PRV1.6	Ability for staff members to export the Certificate of Authenticity for the day that is scanned by Document Processing Services (DPS) at the	Existing Core Product	

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			beginning of the roll		
Preservation	Microfilming - Official Records	PRV1.7	Ability for staff members to export the Scanner Resolution Targets for the day that is scanned by Document Processing Services (DPS) and the satellite offices as the subsequent frames on the microfilm	Existing Core Product	
Preservation	Microfilming - Official Records	PRV1.8	Ability for system to export the images of documents in a sequential order on the microfilm	Existing Core Product	EagleRecorder images can be exported in sequential order.
Preservation	Microfilming - Official Records	PRV1.9	Ability to microfilm the images of the pages within the documents in sequential order	Existing Core Product	
Preservation	Microfilming - Vital Records	PRV2.1	Ability for staff members to export images to send to 16mm microfilm	Existing Core Product	
Preservation	Microfilming - Vital Records	PRV2.10	Ability to export the images of the documents in sequence of Local Registration Number (LRN), book and page#, and/or date of event on the microfilm	Existing Core Product	
Preservation	Microfilming - Vital Records	PRV2.11	Ability to export the images of the pages with in the documents in sequential order on the microfilm	Existing Core Product	
Preservation	Microfilming - Vital Records	PRV2.12	Ability to identify and provide an exception when there is a duplicate Local Registration Number	Existing Core Product	
Preservation	Microfilming - Vital Records	PRV2.13	Ability to put documents with duplicate Local Registration Number on microfilm	Existing Core Product	

Preservation	Microfilming - Vital Records	PRV2.14	Ability to place the documents with duplicate Local Registration Number next to each other on microfilm	Existing Core Product	
Preservation	Microfilming - Vital Records	PRV2.15	Exported documents should be identified in such a way that the first page of each document is uniquely marked to allow for a medium blip	Existing Core Product	Images can be tagged as first or subsequent pages for the Archive Writer.
Preservation	Microfilming - Vital Records	PRV2.16	Exported documents should be identified in such a way that subsequent pages are marked differently than first page of document to allow for a small blip	Existing Core Product	Images can be tagged as first or subsequent pages for the Archive Writer.
Preservation	Microfilming - Vital Records	PRV2.2	Ability for staff members to specify a beginning and ending Local Registration Number to select the document images. Should also be able to select document images by book and page #, type of record and/or date of event	Existing Core Product	
Preservation	Microfilming - Vital Records	PRV2.3	Ability for staff members to microfilm all vitals separately: <ul style="list-style-type: none"> • Birth • Public Marriage • Confidential Marriage • Death 	Existing Core Product	
Preservation	Microfilming - Vital Records	PRV2.4	Ability for staff members to export images to a local machine in order to run the images to microfilm	Existing Core Product	
Preservation	Microfilming - Vital Records	PRV2.5	Ability for staff members to export images into one folder for records requested	Existing Core Product	

Preservation	Microfilming - Vital Records	PRV2.6	Ability to configure the orientation (Cine or Comic) of all the vitals	Existing Core Product	This is typically controlled by the Archive Writer.
Preservation	Microfilming - Vital Records	PRV2.7	Ability to be compatible with Kodak Archive Writer 9620 and Kodak Archive Writer 4800 and/or Fuji Archive Writer	Existing Core Product	Images stored and retrieved from EagleRecorder are compatible with Kodak Archive Writers.
Preservation	Microfilming - Vital Records	PRV2.8	Ability for staff members to microfilm the Certificate of Authenticity for the range that is scanned by Document Processing Services (DPS) at the beginning and the end of the roll	Existing Core Product	
Preservation	Microfilming - Vital Records	PRV2.9	Ability for staff members to export the Scanner Resolution Targets for the day that is scanned by Document Processing Services (DPS) and the satellite offices as the subsequent frames on the microfilm	Existing Core Product	
Preservation	Microfilming - Maps	PRV3.1	Ability for staff members to export maps by book and page to a 35mm archive writer	Existing Core Product	
Preservation	DVD - Maps	PRV3.2	Ability for staff members to select maps to export by book and page and/or by map type and recording date range	Existing Core Product	
Preservation	DVD - Official Records	PRV4.1	Ability for staff members to select official record images by date range	Existing Core Product	

<p>Preservation</p>	<p>DVD/Microfilm - Vital Records</p>	<p>PRV4.10</p>	<p>Ability to export the following fields for the Public Marriage record index:</p> <ul style="list-style-type: none"> • First Person name • First Person last name at birth • First Person new middle name • First Person new last name • Second Person name • Second Person last name at birth • Second Person new middle name • Second Person new last name • Marriage date • Roll • Correction # • Local Registration Number 	<p>Existing Core Product</p>	
<p>Preservation</p>	<p>DVD/Microfilm - Vital Records</p>	<p>PRV4.11</p>	<p>Ability to export the following fields for the Confidential Marriage record index:</p> <ul style="list-style-type: none"> • First Person name • First Person last name at birth • First Person new middle name • First Person new last name • Second Person name • Second Person last name at birth • Second Person new middle name • Second Person new last name • Marriage date • Roll • Correction # • Local Registration Number 	<p>Existing Core Product</p>	

Preservation	DVD - Official Records	PRV4.2	Ability for staff members to export selected official record images by date range to a specific location for creation of DVD	Existing Core Product	
Preservation	DVD - Vital Records	PRV4.3	Ability for staff member to export Vital record images to a specific location for creation of DVD	Existing Core Product	
Preservation	DVD - Vital Records	PRV4.4	Ability for staff member to select Vital record images to export by vital record type, Local Registration Number range, book and page #, type of record and/or date of event	Existing Core Product	
Preservation	DVD - Records	PRV4.5	Ability for the administrator to maintain a security level setting to grant access for the ability to export	Existing Core Product	
Preservation	DVD/Microfilm - Official Records	PRV4.6	Ability to export the following fields for the official record index: <ul style="list-style-type: none"> • Recording date • Grantor • Grantee • Document description name • Document # • Number of pages 	Existing Core Product	
Preservation	DVD/Microfilm - Vital Records	PRV4.7	Ability to export the vital index by date of event range to a specific location for creation of DVD	Existing Core Product	

Preservation	DVD/Microfilm - Vital Records	PRV4.8	<p>Ability to export the following fields for the Birth record index:</p> <ul style="list-style-type: none"> • Child's name • Birth date • Deceased • Roll/Frame# • Correction# • City • Father/Mother • Local Registration Number • Sex 	Existing Core Product	
Preservation	DVD/Microfilm - Vital Records	PRV4.9	<p>Ability to export the following fields for the Death record index:</p> <ul style="list-style-type: none"> • Name • AKA • Death date • Birth date • Roll/Frame # • Correction# • Local Registration Number 	Existing Core Product	
Preservation	Reports	PRV6.1	Vital Page Count – Enter a Local Registration Number range	Existing Core Product	
Preservation	Reports	PRV6.2	Ability to include the selection criteria on the report when it is generated, e.g. date range, document type, LRN range, etc.	Existing Core Product	

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Preservation	Reports	PRV6.3	Ability to include the following information on the report: <ul style="list-style-type: none">• Report date• Staff member name• Page # of ##• Etc.	Existing Core Product	
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Section	Sub-section	Unique Req#	Requirement Description	Tyler's-RFP-Response	Tyler's RFP Comments
Accounting	Accounts Management	ACT3.4	Ability to set up and maintain "master accounts" that contain sub-accounts (e.g. a submitting company that submits documents for multiple title companies)	Future Core Product	
Clerk	Letters (Rejections/Expirations)	CLK12.1	Ability for system to have Letter module which provides staff with a list of all letter templates (such as rejections & expiration letters) by Clerk function	Future Core Product	
Clerk	Online/Kiosk Modules	CLK13.4	Ability for online and kiosk modules to accept new and renewal applications	Future Core Product	
Clerk	Reports & Inventory	CLK15.10	<p>Ability for application to generate the following FBN reports with all required information displayed:</p> <ul style="list-style-type: none"> • # of FBN Filings displaying complete record data • Business Conducted By • FBN Filings by City & County • FBNs with and without Publication • FBN Abandonments • FBN Withdrawals • Missing FBN File Numbers • Expired FBN File Numbers • Unused FBN File Numbers 	Future Core Product	Samples of all reports will be requested from Riverside County to duplicate into Eagle Recorder / Clerk if a standard report does not currently exist.

Clerk	Reports & Inventory	CLK15.16	Ability for application to generate the following Registration Filing reports with all required information displayed: <ul style="list-style-type: none"> • # of Registration Filings (Current and/or Expired) • Current Registrations • Registration Cancelled & Revoked • Registration Missing Numbers • Unused Registration File Numbers • Expired Registration File Numbers 	Future Core Product	Samples of all reports will be requested from Riverside County to duplicate into Eagle Recorder / Clerk if a standard report does not currently exist.
Clerk	Reports & Inventory	CLK15.2	Ability to generate a summary report for all Clerk modules	Future Core Product	EagleSoftware provides a number of summary reports, but we would anticipate additional reports to meet ACR's needs.
Clerk	Reports & Inventory	CLK15.3	Ability to generate a detail report for all Clerk modules	Future Core Product	EagleSoftware provides a number of summary reports, but we would anticipate additional reports to meet ACR's needs.

Clerk	Reports and Inventory	CLK15.8	Ability for application to generate the following Marriage reports with all required information displayed:	Future Core Product	Samples of all reports will be requested from Riverside County to duplicate into Eagle Recorder / Clerk if a standard report does not currently exist.
			<ul style="list-style-type: none"> • Licenses Issued and Recorded/Registered for all or select license types (All Public and Confidential Marriages) • Marriage Licenses not Recorded/Registered for all or select license types (All Public and Confidential Marriages) • Marriage Ceremonies Performed by Office Location • # of Marriage Ceremonies Performed by Deputy Commissioner • # of processed Deputy Commissioner of the Day • # of Marriage Licenses based on Couple's Title • # of Marriage Licenses Issued to Authorized Notaries • Missing Marriage File Numbers & Local Registration Numbers (LRN) • Couple's Personal Data (Name, Address, etc.) for all issued Licenses (All Public & Confidential) • Marriage Licenses Approaching Expiration Date for Registration/Recording • Marriage License Type Changes • Unused Marriage File Number • # of total Affidavit for Duplicates Issued • # of total Marriage License Amendments Issued • # of Affidavit for Duplicates Issued and License Not Recorded/Registered • # of Marriage License Amendments Issued and License Not Recorded/Registered 		

Clerk	Marriage	CLK2.57	Ability to generate and print marriage ceremony script in various languages. English and Spanish languages are required.	Future Core Product	
Clerk	Registrations	CLK6.13	Registration ID Cards must display the following items: digital photograph, electronic signature, all other required Registrant and County information. (Name, Title, Address, Status(Temporary/Permanent), Issuance & Expiration Date, Registration Number, County Name and Other County Information (Requires digital camera, card printer, electronic signature pad at each Clerk office)	Future Core Product	
Clerk	Registrations	CLK6.15	Ability to reprint all Registration cards	Future Core Product	
Certified	Official Records – Counter Customer	CRT1.27	Ability to allow the customer to acknowledge/accept the terms and to authorize the order using a signature pad	Future Core Product	
Certified	Official Records – Counter Customer	CRT1.41	Ability for staff members to create an order for documents that are older and do not have an electronic index or images available. The customer application would use the same order information as electronic index/images, with Book, Page, Type of Book and Year and Document #	Future Core Product	

Certified	Official Records – Online Customer	CRT3.20	Ability to accept payments through a payment gateway	Future Core Product	Tyler currently provides integration with several payment gateways, but we would anticipate some development.
Certified	Vital Records – Online Customer	CRT6.2	Ability for the website to display the 'Certificate of No Records' disclaimer	Future Core Product	
Certified	Reports	CRT8.2	Official Records Sold - listing how many 1st pages and 2nd pages- By location, date, staff member, workstation	Future Core Product	
Cashiering	Bank Note Paper Tracking	CSH6.10	Ability to have a workflow step where lead staff members reconcile the bank note paper against the certificates issued	Future Core Product	
Cashiering	Bank Note Paper Tracking	CSH6.11	Ability to display the transaction, the scanned bank note paper issued, and the electronic customer application	Future Core Product	
Cashiering	Bank Note Paper Tracking	CSH6.14	Ability to view, query and report off of the Bank Note Tracking workflow steps	Future Core Product	
Cashiering	Bank Note Paper Tracking	CSH6.15	Ability for staff members to disposition the work flow step with the following choices: <ul style="list-style-type: none"> • Approve • Reject critical • Reject non-critical and have the option to enter notes	Future Core Product	

Cashiering	Bank Note Paper Tracking	CSH6.5	Ability to track each serial number from the point when it arrives, when it is assigned to an office, when it is assigned to a staff member, and when it is issued or voided	Future Core Product	
Cashiering	Bank Note Paper Tracking	CSH6.6	Ability to keep the history of the events linked to the serial number of the bank note paper	Future Core Product	
Cashiering	Bank Note Paper Tracking	CSH6.7	Ability to query and run reports off of the history information of the bank note paper	Future Core Product	
Cashiering	Bank Note Paper Tracking	CSH6.8	Ability to be able to notate when bank note paper is voided	Future Core Product	

<p>Electronic Recording (ERDS)</p>	<p>Electronic Recording between Government Agencies - Technical requirements</p>	<p>ERD1.1</p>	<p>Ability for vendor's program to directly integrate new Recorder system with TTC's property tax system. TTC's property tax system is currently an IBM Mainframe which will be replaced by Manatron's GRM solution in the future</p>	<p>Future Core Product</p>	<p>Assuming this integration is similar to the one currently in place where electronic documents are submitted in a PRIA compliant package, we don't foresee major issues with the integration. Our Vendor Response is Future Core Product, pending the nature of the new integration with Manatron's GRM solution. We assume that Manatron will utilize a PRIA compliant package similar to what they do in other Treasurer Offices. This statement applies to ERD1.1 - ERD 1.48.</p>
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Electronic Recording (ERDS)	Electronic Recording between Government Agencies - Technical requirements	ERD1.10	Ability for vendor's program to allow Recorder's Office to schedule and run each TTC e-recording job	Future Core Product	The current Treasurer's eRecording process runs as a "black box" process, no human review. We have supported this process in the past for other customers and we can implement it for ACR. A minor modification would be required to allow scheduling of the job.
Electronic Recording (ERDS)	Electronic Recording between Government Agencies - Technical requirements	ERD1.11	Ability for each job to process all (one or more) available TTC file submissions	Future Core Product	
Electronic Recording (ERDS)	Electronic Recording between Government Agencies - Technical requirements	ERD1.18	Ability for vendor's program to automatically execute the Recorder's entire receipting workflow within the new Recorder system with minimal staff member involvement	Future Core Product	The current Treasurer's eRecording process runs as a "black box" process, no human review. We have supported this process in the past for other customers and we can implement it for ACR. A minor

						modification would be required to allow scheduling of the job.
Electronic Recording (ERDS)	Electronic Recording between Government Agencies - Technical requirements	ERD1.2	Ability to process TTC's data files which contain fixed length, non-delimited data fields. Note: TTC currently extracts data directly from the County's IBM mainframe. In the future data will be extracted from Manatron's GRM system at which time additional data transfer options may be possible	Future Core Product		
Electronic Recording (ERDS)	Electronic Recording between Government Agencies - Technical requirements	ERD1.3	Ability to process TTC's data files which include but are not limited to the following data: Lien Number, Date, Customer Information, TTC Information, etc.	Future Core Product		
Electronic Recording (ERDS)	Electronic Recording between Government Agencies - Technical requirements	ERD1.4	Ability for vendor's program to validate and report all file format and content errors for each TTC file submission. Error handling should include but is not limited to the following: check for special characters, check for carriage returns, etc.	Future Core Product		

Electronic Recording (ERDS)	Electronic Recording with SECURE - Technical requirements	ERD2.13	Ability to return updated document images and receipts to SECURE after a change is made to original record	Future Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Technical requirements	ERD2.9	Ability for vendor's host program to handle the SECURE Call-Back scenario. Call back will occur when a new package is submitted to the SECURE Bridge and subsequently deleted by the Submitter before the host program can pull it down. Note: SECURE allows Submitters to call back/delete a package that has already been submitted only while the packages has not been pulled/checked-out by Riverside County. Currently this functionality has been disabled in SECURE for all Riverside County submitters.	Future Core Product	EagleSoftware currently handles this because the "Call-Back" functionality is turned off in SECURE. Custom development will be required to recognize and correctly respond to packages that have been called back.
Electronic Recording (ERDS)	Electronic Recording with SECURE - Electronic Examination & Recording	ERD3.5	The application should capture and display all titles, images, and receipting data for a multi-title document on one screen	Future Core Product	

Electronic Recording (ERDS)	Electronic Recording with SECURE -Workflow Management	ERD9.12	<p>Management dashboard must allow filtering on the following data:</p> <ul style="list-style-type: none"> • SECURE package order number • Package status • SECURE submission date • Application retrieval date • Package recording date • Submitter • Packages assignment name • Queue 	Future Core Product	
Examining	Up-front Scanning	EXM2.14	System must allow examiners to view two images within the same document on their secondary monitor in a side-by-side and split screen view	Future Core Product	
Examining	Document Stamps/Annotations	EXM4.2	System must have the ability to assign certain electronic stamps to only be used by specific staff members	Future Core Product	
General	General	GEN1.12	<p>Ability to support the ID Card Reader and the associated software that should accept the following forms of ID cards:</p> <ul style="list-style-type: none"> • State Issued Driver's license • State issued Identification Card • Other US Govt. issued Identification Cards 	Future Core Product	

General	General	GEN1.13	<p>Ability for system to capture the following customer information from the sliding of the customer's identification card:</p> <ul style="list-style-type: none"> • Name • Address • City • State • Zip Code • Expiration Date • Type of ID • ID Number 	Future Core Product	
General	General	GEN1.27	<p>All images and data will be written to system's document repository and database. Document repository and database will be mirrored at a secondary ACR location</p>	Future Core Product	<p>EagleRecorder has the ability to write data/images to the EagleRecorder database. Writing data/images to Documentum will require custom development; and we assume mirroring the data/images at another site will be done by Documentum</p>
General	General	GEN1.35	<p>Ability for system to allow an authorized user to assign documents to a training workflow queue for processing by a new employee. The new employee's work items will go into the trainer's work</p>	Future Core Product	

			queue for approval		
General	General	GEN1.6	Ability to restrict staff member from copying, cutting or altering electronic signatures/initials in any way	Future Core Product	
General	Audit Trail	GEN3.2	Ability for system to allow lead staff member to search the full audit trail data by User Id, Date, Document #, File#, Instrument #, Local Registration Number, Workstation, etc. and/or combination of any of these fields	Future Core Product	
General	Audit Trail	GEN3.4	Ability for the system to track Workstations and Locations in Audit Trail	Refined Requirement	[Tyler]: Tyler has added initial Location capability in the 3.11 Release. Auditing by Location and Workstation will be in a future release.
General	Admin/Security	GEN4.6	Ability to define Location based setup, configuration, access needs etc.	Refined Requirement	[Tyler]: Tyler has added initial Location capability in the 3.11

					<p>Release. Initial location based setup has been added. Additional Location capabilities will be in a future release. We would like greater definition on ACR's "setup" and "configuration" requirements.</p> <p>[ACR]: ACR has Locations at the higher level in the hierarchy and workstations are tied to Locations.</p>
General	Admin/Security	GEN4.8	Ability to set security in system using roles or responsibilities for each location.	Refined Requirement	<p>[Tyler]: Additional development may be required to link Location and Security roles.</p>

General	Report	GEN5.16	Ability for the system to run all reports by location.	Refined Requirement	[Tyler]: Additional location capabilities will be in a future release. [ACR]: The future release will be delivered during the project phases and is within the scope of this project.
Historical Conversion	Historical Indexing Workflow	HST3.26	Ability for a lead staff member to sort the tasks by document #, and document code	Future Core Product	
Historical Conversion	Historical Indexing Workflow	HST3.32	On multiple-title documents, the ability to change sequence numbers, delete all sequences and insert sequences on documents that were examined and feed incorrectly or written incorrectly.	Future Core Product	EagleSoftware currently supports changing the sequence in the receipt, but not in other software modules.
Indexing	Official Records	IND1.25	Ability for lead staff member to sort tasks by document #, document code, staff member name	Future Core Product	
Indexing	Official Records	IND1.30	Ability for staff members to be able to change sequence numbers in multiple-title documents	Future Core Product	

Indexing	Official Records	IND1.36	Ability to flag official records or any record and create a message that will pop up when the record is opened by any user (useful for DD214s).	Refined Requirement	[Tyler]: Any user? Do we need to differentiate between Staff and Public Users?
Indexing	Vitals	IND2.11	Ability to import index and images from county or state for vital records. (AVSS)	Refined Requirement	[ACR]: Staff, NOT Public Users. [Tyler]: Can we assume the index and image format is consistent? What is the index and image format? Can we get a sample import file?
Indexing	SSN Redaction -Current Day	IND5.13	Ability to store a set of unredacted images in a secure folder structure in Documentum with restricted access	Future Core Product	This will be handled via the integration with Documentum.
Indexing	SSN Redaction - Historical	IND6.19	Ability to create a table with the statistics on the redaction process that will allow a staff member to access for additional data-mining	Future Core Product	While EagleRecorder provides statistical information, we would anticipate the need to create a custom report to satisfy your specific

						requirements.
Indexing	SSN Redaction - Historical	IND6.20	Ability to store the redacted images in a secure folder structure in Documentum with restricted access	Future Core Product	This feature will be a part of the integration with Documentum	
Indexing	SSN Redaction - Historical	IND6.8	Ability to alert if a staff member enters a range of documents that have already been processed	Future Core Product		
Indexing	Reports - Official Records	IND8.10	Map Review - Shows type of map and book and page assigned to each map recorded not captured by Map Book & Page Review report	Future Core Product	We will create a report to meet this requirement.	
Indexing	Reports - Official Records	IND8.4	New Outstanding Workflow Report - Indicates how many tasks are left to verify before advancing proof date	Future Core Product		
IT Security & Infrastructure	Maintenance & Support	ITS7.1	Vendor is available for support M-F 6:00 AM to 6:00 PM PST	Future Core Product	Tyler IT support is available beginning at 6:00 a.m. PT through 3:00 p.m. PT. Additional IT support coverage can be negotiated.	
IT Security & Infrastructure	Maintenance & Support	ITS7.5	Vendor must provide a maintenance and support plan on how they will support the application and integration solution into Documentum, both during working hours and after hours and provide Service Level Agreements along with	Custom Enhancement		

			contact information		
IT Security & Infrastructure	Data Conversion	ITS8.2	All images and metadata will need to be migrated into Documentum as part of this project	Future Core Product	
IT Security & Infrastructure	Documentum Configuration & Migration	ITS9.1	Configure Documentum as the single source of repository for all recorded Documents as per Trusted System requirements including retention policies	Future Core Product	
IT Security & Infrastructure	Documentum Configuration & Migration	ITS9.2	Migrate all the existing images and associated metadata into Documentum	Future Core Product	All images will be converted into EagleRecorder first, and then migrated to Documentum after user acceptance and sign-off.
IT Security & Infrastructure	Documentum Configuration & Migration	ITS9.3	Migrate all the existing unredacted images and associated metadata from existing Documentum environment to the new Documentum environment	Future Core Product	
Preservation	Microfilming - Vital Records	PRV2.17	Ability to advance vitals separate from official records	Refined Requirement	[Tyler]: Functionality will be available in a future release. [ACR]: The future release will be delivered during the

						project phases and is within the scope of this project.
Archive & Trusted System	Compliance	TRS11.1	Tyler must ensure that the proposed Trusted System solution is designed and implemented in accordance with County of Riverside Board Policy A-68.	Refined Requirement	[Tyler]: With the current exception to PDF/A's. [ACRI]: Yes, this is correct.	
Archive & Trusted System	Official Records Retention Schedule	TRS11.10	Images in the Eagle Software must be automatically purged at a configurable number of days after completing the Documentum Export workflow step.	Refined Requirement	[ACRI]: Tyler can keep the audit information after the images are purged.	
Archive & Trusted System	Procedural Standards of Official Electronic Records	TRS11.12	The Eagle Software must include a workflow step for Advancing of the Day for Vital Records.	Refined Requirement		
Archive & Trusted System	Data Security	TRS11.13	Any images imported into the CARDS Documentum folders must be processed and/or passed through the Eagle Software.	Refined Requirement		
Archive & Trusted System	Technological Standard	TRS11.14	The Eagle Software needs to write metadata (indexed values) and images to two Documentum SANS independently and simultaneously at two separate locations.	Refined Requirement	[Tyler]: Not sure if this is correct? I envisioned we'd write to one and the Documentum system replicates to the second? [ACRI]: No, metadata	

					and images have to be written to both SANS independently and simultaneously.
Archive & Trusted System	Technological Standard	TRS11.15	Both Documentum SANS require testing during any upgrades.	Refined Requirement	
Archive & Trusted System	Audit Trail	TRS11.18	The system must keep an event/audit log of any exporting or printing of official records.	Refined Requirement	[Tyler]: Does Documentum provide this functionality? Eagle Software does not. [ACR]: ACR will discuss internally.
Archive & Trusted System	Technological Standard	TRS11.2	Eagle software must use the Documentum Image Repository as the sole source of official permanent and non-permanent images.	Refined Requirement	[Tyler]: Agreed

<p>Archive & Trusted System</p>	<p>Admin/Security</p>	<p>TRS11.23</p>	<p>The Eagle Software must have the ability to seal images of official vital birth records through a workflow process which tracks the changes in the audit trail. (Example: Currently, Birth Vital records are sealed using California's State Department of Health Vital Records Section preferred practice by deleting the original birth record and scanning in a target or new record. No old images can be kept. Once the electronic record is updated, new film is created and the old film is destroyed.)</p>	<p>Refined Requirement</p>	
<p>Archive & Trusted System</p>	<p>Technological Standard</p>	<p>TRS11.24</p>	<p>The Eagle Software must reproduce a true and accurate representation of the original official record without permitting additions, deletions, or changes to the original official record images. Image versioning must be used. (Prior versions are only accessible through role based security.)</p>	<p>Refined Requirement</p>	

Archive & Trusted System	Official Records Retention Schedule	TRS11.25	Documentum must be configured to manage records based on the record retention schedules in Attachment GRS, Attachment CRS, and Attachment RRS.	Refined Requirement	[Tyler]: Record retention configured and managed by whom? ACR? Wave? Tyler? [ACR]: Tyler to configure and ACR to manage based on retention schedule. No involvement for WAVE.
Archive & Trusted System	Official Records Retention Schedule	TRS11.26	Documentum and the Eagle Software must be configured to remove any images and/or data when a record meets its retention expiration.	Refined Requirement	[Tyler]: Same question as above regarding Documentum. [ACR]: Tyler to configure and ACR to manage based on retention schedule.
Archive & Trusted System	Official Records Retention Schedule	TRS11.27	When a record meets its retention expiration, the image must be removed from all applicable systems. The data may also be removed but will be dependent on record type.	Refined Requirement	
Archive & Trusted System	Official Records Retention Schedule	TRS11.28	The Eagle Software must have the ability to have separate retention schedules for images and data.	Refined Requirement	[Tyler]: Images would be in Documentum, so the image retention scheduling needs to be implemented there; data retention

					<p>in Eagle Software; we'd need to delete/update the data / metadata written to Documentum to keep those in sync after expiration of data [ACR]: ACR agrees.</p>
<p>Archive & Trusted System</p>	<p>Official Records Retention Schedule</p>	<p>TRS11.29</p>	<p>Documentum must have a retention process that includes: Approvals, Destruction Certificate, permanent storage of destruction process information, reports, etc.</p>	<p>Refined Requirement</p>	<p>[Tyler]: Documentum retention policy configured and managed by whom? ACR? Wave? Tyler? [ACR]: Tyler to configure and ACR to manage based on retention schedule. No involvement for WAVE.</p>
<p>Archive & Trusted System</p>	<p>Data Security</p>	<p>TRS11.3</p>	<p>The Trusted System must not permit unauthorized additions, deletions, or changes to the original official records.</p>	<p>Refined Requirement</p>	<p>[Tyler]: Agreed</p>

<p>Archive & Trusted System</p>	<p>Official Records Retention Schedule</p>	<p>TRS11.30</p>	<p>Documentum must be configured to suspend purging of scheduled documents for relevant cause such as litigation, audit or records request.</p>	<p>Refined Requirement</p>	<p>[Tyler]: Documentum configured and managed by whom? ACR? Wave? Tyler? [ACR]: Tyler to configure and ACR to manage based on retention schedule. No involvement for WAVE.</p>
<p>Archive & Trusted System</p>	<p>Data Security</p>	<p>TRS11.31</p>	<p>The integration between Eagle Software and Documentum must track all image and data transfers between the systems and report all transaction errors/exceptions.</p>	<p>Refined Requirement</p>	<p>[Tyler]: Tracking in Documentum? Tracking in Eagle? Both? [ACR]: Both.</p>
<p>Archive & Trusted System</p>	<p>Image Quality</p>	<p>TRS11.33</p>	<p>Tyler must provide a utility to check and report on corrupt images.</p>	<p>Refined Requirement</p>	<p>[Tyler]: This would need to happen in Documentum (not sure what tools are available to tell if an image is corrupt when the image is not in our system) [ACR]: Tyler to confirm the functionality of their utility, ACR to check with EMC.</p>

Archive & Trusted System	Admin/Security	TRS11.34	The Eagle Software must have the ability to amend and/or change the index information of an official record through a workflow process which tracks the changes in the audit trail. (Change After Proof/CAP)	Refined Requirement	[Tyler]: Agreed, will need to be developed in conjunction with the Documentum integration. Eagle Software already tracks changes to index information.
Archive & Trusted System	Admin/Security	TRS11.35	The Eagle Software must have the ability to version images of an official record through a workflow process which tracks the changes in the audit trail. (Change After Proof/CAP)	Refined Requirement	[Tyler]: Documentum will track versions and provide version info back to Eagle Software.
Archive & Trusted System	Admin/Security	TRS11.36	The Eagle Software must have the ability to amend and/or change Vital records through a workflow process which tracks the changes in the audit trail.	Refined Requirement	[Tyler]: Agreed, will need to be developed in conjunction with the Documentum integration. Eagle Software already tracks changes to index information.

Archive & Trusted System	Procedural Standards of Official Electronic Records	TRS11.4	The Eagle Software must be able to create, accept, and uniquely identify an official record and whether they are permanent and non-permanent records.	Refined Requirement	[Tyler]: Agreed
Archive & Trusted System	Procedural Standards of Official Electronic Records	TRS11.5	The Eagle Software must include a workflow step for Documentum Export where the image and metadata (indexed values) are written to Documentum.	Refined Requirement	[Tyler]: Agreed
Archive & Trusted System	Procedural Standards of Official Electronic Records	TRS11.6	The Eagle Software should classify records in a working status until they have completed the Documentum Export workflow step.	Refined Requirement	[Tyler]: Assume this should be after Documentum reports back that the image has been successfully written [ACR]: Assumption is correct.
Archive & Trusted System	Procedural Standards of Official Electronic Records	TRS11.7	All data pertaining to Clerk and Recorder records will be stored in the Eagle Software database. A subset of indexing data will be copied and stored in Documentum as metadata.	Refined Requirement	[Tyler]: Subset needs to be defined but it might be easier just to write all the document data and metadata to Documentum [ACR]: Tyler to define the difference between Document data and metadata

					copied to Documentum
Archive & Trusted System	Data Security	TRS11.8	The Eagle Software must support image versioning capabilities. Records may need to be reprocessed once the record has been committed to Documentum.	Refined Requirement	

Archive & Trusted System	Procedural Standards of Official Electronic Records	TRS11.9	The Eagle Software should display the current image version of the record contained in Documentum.	Refined Requirement	
Archive & Trusted System	Admin/Security	TRS11.20	The Eagle Software must use role based security to access images.	Refined Requirement	
Archive & Trusted System	Audit Trail	TRS11.16	The Eagle Software must keep an event log for each record created.	Refined Requirement	
Archive & Trusted System	Audit Trail	TRS11.17	The Eagle Software must keep audit history for each record created.	Refined Requirement	
Archive & Trusted System	Data Security	TRS11.21	The Eagle software must be configured to only allow new records to be created in the system through an authorized workflow process.	Refined Requirement	
Archive & Trusted System	Data Security	TRS11.19	<p>The Eagle Software must support image version controls.</p> <p>Examples include:</p> <ul style="list-style-type: none"> - Automatic update of version number - No more than one person to check out specific document for modification at one time - Use of role based security to perform functions <p>—Etc.</p>	Refined Requirement	[Tyler]: Etc? [ACR]: Removed 'Etc.'

Archive & Trusted System	Procedural Standards of Official Electronic Records	TRS11.11	The Eagle Software must include a workflow step for Advancing of the Day for Recorded Official Records.	Refined Requirement	[Tyler]: If one Integrated System, then need separate OR and VR process. [ACR]: ACR agrees.
Cashiering	Bank Note Paper Tracking	CSH6.8	Ability to be able to notate when bank note paper is voided	Future Core Product	
Cashiering	Paid by	CSH3.4	Ability to automate the capture of the payer information (capture the driver license#, name, address, etc.) by swiping a driver's license or other Government issued ID	Future Core Product	
Clerk	Deputy Commissioner for the Day	CLK8.4	Ability to capture applicant's electronic signature using a signature pad	Future Core Product	
Clerk	Marriage	CLK2.17	Ability to capture both applicants' electronic signatures on the marriage license application to confirm that applicants have reviewed the license and understand all necessary terms, etc.	Future Core Product	
General	Admin/Security	GEN4.7	Ability for staff to have only one user I.D regardless of locations. (Settings should be tied to workstation, not staff.)	Refined Requirement	[Tyler]: One I.D. is currently supported. Location capability will define users settings at that location.
IT Security & Infrastructure	Hardware	ITSS.10	Ability to work on Wyse thin clients, minimum Windows CE 6.0	Future Core Product	Subject to acceptable product testing.

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IT Security & Infrastructure	Maintenance & Support	ITS7.1	Vendor is available for support M-F 6:00 AM to 6:00 PM PST	Future Core Product	Tyler IT support is available beginning at 6:00 a.m. PT through 3:00 p.m. PT. Additional IT support coverage can be negotiated.
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Section	Sub-section	Unique Req #	Requirement Description	Tyler's-RFP-Response	Tyler's RFP Comments
Missing Requirement from 2/13 - 2/14 discussions	Electronic Recording with SECURE - Technical requirements	ERD2.6	Ability for vendor's host program to pull in the following items from SECURE: new packages (data and images), deleted documents (notice to remove from held package) and corrected documents (replace documents in held package)	Future Core Product	EagleSoftware can currently pull in new and resubmitted packages but does not handle deleted document or corrected (replacing) documents.
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package Rejections & Deletions	ERD8.1	Ability to reject an entire package	Existing Core Product	Applies to Document Level Rejection. Currently support package rejection.
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package Rejections & Deletions	ERD8.10	Recording time logic should be based on the queue designation	Existing Core Product	Applies to Document Level Rejection. Currently support package rejection.

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Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.11	Packages pending submitter return should remain in the Examiner's queue	Future Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.12	Ability for all staff members to record packages which contain recordable documents as well as rejected document(s) that have been deleted in SECURE by a submitter.	Future Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.13	Ability to configure how Examiners review corrected and deleted documents and packages	Future Core Product	

<p>Electronic Recording (ERDS)</p>	<p>Electronic Recording with SECURE - Package Rejections & Deletions</p>	<p>ERD8.14</p>	<p>Ability to handle all corrected document scenarios which includes but is not limited to the following:</p> <ul style="list-style-type: none"> • A rejected package could come back in with fewer documents than originally sent • A rejected document could come back in with less or more pages than originally sent • A rejected document could come back with additional attachments scanned in that were not originally submitted (e.g. PCOR, DTT Affidavit) • A rejected document could come back with deleted attachments (e.g. PCOR, No Show) • A rejected document could come back with additional titles selected • A rejected document could come back with additional titles that were originally selected and are now deleted • A rejected document could come back with the header title changed to a completely different document title • Documents rejected in a package could come back in a 	<p>Future Core Product</p>
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Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.15	Documents being rejected should only be sent back to the submitter after the Examiner has reviewed all documents in a package	Existing Core Product	Applies to Document Level Rejection. Currently support package rejection.
different recording order than originally					

Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.16	Ability to handle scenario where some or all documents in a package are deleted by a Submitter in SECURE after they were rejected by the County. Examining module should reflect document deletions by Submitters	Future Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.17	SECURE submission time and ERDS auto-retrieval time must be in the same format as the rest of recording modules	Existing Core Product	Applies to Document Level Rejection. Currently support package rejection.
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.2	Ability to reject one or all documents in a package and keep package as a placeholder	Future Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.3	Ability to pull corrected documents back into the placeholder package in the right order using SECURE's Sequence ID	Future Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.4	Ability for system to track and display package status	Future Core Product	

Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.5	Ability for system to track and display document status	Future Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.6	Package and document status should automatically change to reflect all corrections, deletions, rejections and completions	Future Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.7	Application should clearly identify package and document status in Examiner's task list and queue	Future Core Product	
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.8	Un-rejected documents in a package should retain their cashiering information as entered by an Examiner	Existing Core Product	Applies to Document Level Rejection. Currently support package rejection.
Electronic Recording (ERDS)	Electronic Recording with SECURE - Package & Document Level Rejections & Deletions	ERD8.9	Packages should retain their queue designation even when they contain rejected documents	Existing Core Product	Applies to Document Level Rejection. Currently support package rejection.

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<p>Missing Requirement from 2/13 - 2/14 discussions</p>	<p>Electronic Recording with SECURE - Administration</p>	<p>ERD10.10</p>	<p>Ability for system to allow corrected, deleted and rejected documents and rejected packages to be pushed and pulled between SECURE and the County irrespective of whether the auto-retrieval function is disabled</p>	<p>Future Core Product</p>	
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