

## ADDENDUM B – Hybrid Model

### E-Signature System Technical Specifications Checklist

The City of Burnsville’s Required and Preferred Specifications in an Electronic Signature Solution (SaaS solution) are listed below. Please indicate for each item if your system will Comply, Not Comply, or Comply With Modifications (specify the modifications needed or exceptions in your response).

**Name of Company/Solution:** \_\_\_\_\_

#### SECTION 1 – REQUIRED SPECIFICATIONS

Item No.	Required Specifications	Comply	Not Comply	Comply w/ Modifications (specify)
1.1	The vendor must support and maintain the application (Hybrid deployment).			
1.2	Utilize active directory (the City’s user directory system) for internal single factor or two-factor authentication.			
1.3	Permit external party signing, including options for two-factor or multi-factor authentication.			
1.4	All signatures must have a date/time stamp.			
1.5	Must have compatibility with mobile devices, tablets, smartphones, and laptops.			
1.6	Must meet the following security mandates:			
	A. CJIS Security Policy			
	B. HIPPA			
	C. FedRAMP			
	D. PCI			
1.7	The solution must accommodate multiple file formats to be converted into fillable documents, including but not limited to PDF, TIFF, DWG, DXF and all Microsoft file formats.			
1.8	The product must create audit trails that remain with the document and the ability for staff to track the documents’ progress.			
1.9	Multiple security levels maintained by City staff to restrict or enable users’ access to templates, shared documents or retrieval of documents based on groups.			
1.10	The following options must be available to all City staff:			
	A. Simple workflow options permitting documents to be routed sequentially or all at one time, choose reviewers and/or approvers, ability to save routing trees, ability to select secondary signer.			
	B. Ability to redact specific fields/data.			
	C. Capability to make fields required or optional for recipients.			
	D. Document should remain editable before the first signature is attached with the appropriate security settings.			
	E. Edits after the first signature and before final signatures should have metadata attached to identify when the change was made and by whom. All changes and additions to a document should create an audit trail.			
	F. Permit the option of batch signing documents or signing one by one.			
1.11	Ability to define document retention.			
1.12	Extendable enterprise platform to address high volume of users and transactions.			
1.13	Flexible enterprise platform to address the integration needs of the City with modern APIs and integration format capabilities.			

ADDENDUM B - Hybrid Model

**SECTION 2 – PREFERRED SPECIFICATIONS**

Item No.	Preferred Specifications	Comply	Not Comply	Comply w/ Modifications (specify)
2.1	Support electronic notarization processes.			
2.2	Capability for the City to brand the website where the document is signed.			
2.3	Can copy user information into all fields requiring the same data elsewhere within the document/ packet.			
2.4	Ability to create documents to send in a batch using docx, txt, dat, csv, xml and Microsoft Excel formats.			
2.5	Reporting and dashboards that show information regarding documents, recipients and usage.			
2.6	Notifications of document destruction.			
2.7	Provide end user support 24/7/365 days.			
2.8	Support single sign on capabilities.			
2.9	Ability for Active Directory groups to set group permissions in the system.			
2.10	The system can perform simple math (add, subtract, multiply and divide) as well as comparisons to numeric/text data entered in fields.			
2.11	Mobile application for iOS and android devices (Apple Store, Google Play).			
2.12	The following options for all City staff:			
	A. Can add additional signature(s) to documents after the final signature is added without any edits.			
	B. Ability to select secondary signers or assign to a group where any one signature is required.			
	C. If batch signing, permit the user to remove one or more documents from the list before attaching signature.			
	D. Allows City staff to control the editing of specific fields/data by the user.			
	E. Can control field formats (i.e. text, numeric, etc.).			
	F. Allows the document to have default data (prefilled fields) entered by City staff or defined by user attributes.			
	G. Ability to flag important information and signature lines to be entered/read by the user.			
	H. Allows City staff to select from drop downs, check boxes and radio buttons created by administrators OR City Staff.			
	I. Ability to share templates and documents to specific users or groups.			
2.13	Ability to integrate with City systems in use such as:			
	A. Microsoft O365			
	B. Laserfiche (Electronic Content Management System)			
	C. Tyler Technologies - New World ERP			
	D. CentralSquare - TrakIt (Community Development)			
	E. Vermont Systems – RecTrac (Recreation Management System)			