

**FEDERAL SUPPLY SERVICES  
AUTHORIZED FEDERAL SUPPLY SCHEDULE PRICE LIST**

Online access to contract ordering information, terms and conditions, up-to-date pricing and the option to create an electronic delivery order are available through GSA Advantage!®, a menu-driven database system. The internet address for GSA Advantage! is: GSAAdvantage.gov.

**Multiple Award Schedule**

**Large Category: Office Management**

**Subcategory: Records Management**

**Special Item Number (SIN) 518210ERM – Electronics Records Management Solutions**

FSC Class 7030 – Information Technology

Software Microcomputer Application

Software

Software Maintenance as a Product

FSC Class 7030 – Information Technology

Software Microcomputer Application

Software



Contract Number 47QSMA20D08NV

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at [fss.gsa.gov](http://fss.gsa.gov)

Companion Data Services, LLC  
I-20 at Alpine Road  
Columbia, SC 29219-0001  
803-264-3610

<https://www.companiondataservices.com>; OR  
[CDS.GSASchedule70@companiondataservices.com](mailto:CDS.GSASchedule70@companiondataservices.com)

**Period Covered by Contract: January 07, 2020, through January 06, 2025**

**List of Mass Mod Approvals**

<b>Mod #:</b>	<b>Title:</b>	<b>Date of Action</b>
A653	Implementation of Order Level Material (OLM) SINs	01/22/2020
A808	Prohibition on Contracting for Certain Telecommunications and Video Surveillance	01/22/2020
A812	MAS Consolidation	02/06/2020

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## CUSTOMER INFORMATION

### 1. TABLE OF AWARDED SPECIAL ITEM NUMBERS

SIN	ITEM
518210ERM	Electronics Records Management Solutions
OLM	Order-Level Materials (OLM)

### 2. LOWEST PRICED MODEL NUMBER AND PRICE FOR EACH SIN

SIN	OFFEROR	ITEM
518210ERM	Companion Data Services, LLC	DSSGCON-M102 \$0.30

3. **MAXIMUM ORDER:** Not applicable

4. **MINIMUM ORDER:** \$100.00

5. **GOEGRAPHICAL COVERAGE (DELIVERY AREA):**

Worldwide

6. **POINTS OF PRODUCTION:**

Columbia, South Carolina, Richland County

7. **DISCOUNT FROM LIST PRICE:**

Government Prices are Net

8. **QUANTITY DISCOUNT(S):**

Additional 1% discount for single orders exceeding \$300,000

9. **PROMPT PAYMENT TERMS:**

.25% Net 20 or 0% Net 30 days from receipt of invoice or date of acceptance, whichever is later.

Information for Ordering Offices: Prompt payment terms cannot be negotiated out of the contractual agreement in exchange for other concessions.

10. **NOTIFICATION THAT GOVERNMENT PURCHASE CARDS ARE ACCEPTED:**

a. Government Purchase Cards **are** accepted at or below the micro-purchase threshold

b. Government Purchase Cards **are not** accepted above the micro-purchase threshold

11. **FOREIGN ITEMS:** None

12. **TIME OF DELIVERY:**

The contractor shall deliver within the number of calendar days after receipt (ARO), as set forth below:

SIN	Normal Time of Delivery	Expedited Delivery*	Overnight or 2 Day Delivery	Urgent Requirement**
518210ERM	30 Days ARO	As Negotiated	As Negotiated	As Negotiated

\*Items available for expedited delivery are noted in this price list.

\*\*In accordance with the clause at 552.238-94 ACCELERATED DELIVERY REQUIREMENTS (MAY 2019)

**13. F.O.B. POINT(S):**

Destination

**14. A. ORDERING ADDRESS:**

Companion Data Services, LLC  
I-20 at Alpine Road, AA-278  
Columbia, SC 29219-0001  
<https://www.companiondataservices.com>

**B. ORDERING PROCEDURES FOR FEDERAL SUPPLY SCHEDULE CONTRACTS:**

Ordering activities shall use the ordering procedure of Federal Acquisition Regulation (FAR) 8.405 when placing an order or establishing a Blanket Purchase Agreements (BPAs) for supplies or services. These procedures apply to all schedules.

- a. FAR 8.405-1 Ordering procedures for supplies and services not requiring a statement of work.
- b. FAR 8.405-2 Ordering procedures for supplies and services requiring a statement of work.
- c. FAR 8.405-3 Ordering procedures for supplies on Blanket Purchase Agreements (BPAs).

**15. PAYMENT ADDRESS:**

Companion Data Services, LLC  
Attn: CDS Finance-AF789  
2401 Faraway Drive  
Columbia, SC 29219-0001

**16. WARRANTY PROVISION:** See Pages 4 through 5 and 16 through 17

**17. EXPORT PACKING CHARGES:** Not applicable

**18. TERMS AND CONDITIONS OF GOVERNMENT PURCHASE CARD ACCEPTANCE:**

Accepted at or below and above the micro-purchase level

**19. TERMS AND CONDITIONS OF RENTAL, MAINTENANCE, AND REPAIR (IF APPLICABLE):** Not applicable

**20. TERMS AND CONDITIONS OF INSTALLATION (IF APPLICABLE):** Not applicable

**21. TERMS AND CONDITIONS OF REPAIR PARTS INDICATING DATE OF PARTS PRICE LISTS AND ANY DISCOUNTS FROM LIST PRICES (IF AVAILABLE):** Not applicable

- A. TERMS AND CONDITIONS FOR ANY OTHER SERVICES:** See pages XXXXX
- 21. LIST OF SERVICES AND DISTRIBUTION POINTS (IF APPLICABLE):** Not applicable
- 22. LIST OF PARTICIPATING DEALERS (IF APPLICABLE):** Not applicable
- 23. PREVENTIVE MAINTENANCE (IF APPLICABLE):** Not applicable
- 24. A. SPECIAL ATTRIBUTES SUCH AS ENVIRONMENTAL ATTRIBUTES (e.g. recycled content, energy efficiency, and/or reduce pollutants):** Not applicable
- 25. B. SECTION 508 COMPLIANCE FOR EIT:** See pages 31 through 43
- 26. DATA UNIVERSAL NUMBER SYSTEM (DUNS) NUMBER:** 362904331
- 27. NOTIFICATION REGARDING REGISTRATION IN SYSTEM OF AWARD MANAGEMENT (SAM) DATABASE:** CAGE Code 8ADG0

**TERMS AND CONDITIONS APPLICABLE TO DOCFINITY PERPETUAL ON-PREMISE LICENSING  
OPTION – SIN 518210ERM**

**1. INSPECTION/ACCEPTANCE**

The Contractor shall only tender for acceptance those items that conform to the requirements of this contract. The ordering activity reserves the right to inspect or test any software that has been tendered for acceptance. The ordering activity may require repair or replacement of nonconforming software at no increase in contract price. The ordering activity must exercise its post-acceptance rights (1) within a reasonable time after the defect was discovered or should have been discovered; and (2) before any substantial change occurs in the condition of the software, unless the change is due to the defect in the software.

**2. ENTERPRISE USER LICENSE AGREEMENTS REQUIREMENTS (EULA)**

The Contractor shall provide all Enterprise User License Agreements in an editable Microsoft Office (Word) format.

**3. GUARANTEE/WARRANTY**

- a. Unless specified otherwise in this contract, the Contractor's standard commercial guarantee/warranty as stated in the contract's commercial pricelist will apply to this contract.

**Ownership.** Vendor represents that it is the owner of the entire right, title, and interest in and to the Licensed Software, and that it has the right to grant licenses thereunder, and that it has not knowingly granted licenses therein to any other entity that would restrict rights granted or Services provided to Customer hereunder.

**Quality of Software.** Vendor makes no Warranties except as expressly provided herein. Vendor warrants that the media on which a Product is furnished to be free from defects in materials and workmanship for the life of the products from the date of delivery to Customer. Vendor warrants that the Licensed Software, as delivered by Vendor, is an accurate version and will reasonably conform to the material specifications as described in the Licensed Software documentation. Vendor warrants the provision of expedient maintenance and support when problems and errors with the software occur in a manner consistent with industry standards. Customer acknowledges that Vendor's performance with regard to software maintenance and support is governed by the terms and conditions set forth on Exhibit B hereto. Vendor shall replace any media that is defective in materials and workmanship throughout the term of this Agreement. Such defective media must be returned to Vendor, or its assigns, and Vendor shall replace defective media within 5 business days of Customer's notification to Vendor that said media is defective.

**No Malicious Code.** At the time of delivery (and, if applicable, implementation by Vendor or its contractors), all Licensed Software shall be free of any and all time locks, viruses, trojans, worms, spyware, adware, other malware and malicious code, copy protect mechanisms, back doors, or any disclosed or undisclosed features designed to (i) disable the Licensed Software or render it incapable of operation (whether after a certain time, after transfer to another machine, or otherwise), (ii) permit access unauthorized by Customer to the Licensed Software or to any

Customer networks, systems, programs, or data, or (iii) enable Vendor to track Customer's or users' use of the Licensed Software without Customer's express consent.

**EXCLUSIONS OF OTHER WARRANTIES.** VENDOR MAKES NO WARRANTY, EXPRESS OR IMPLIED, OTHER THAN THOSE SET FORTH HEREIN OR ANY EXHIBIT.

- b. The Contractor warrants and implies that the items delivered hereunder are merchantable and fit for use for the particular purpose described in this contract. If no implied warranties are given, an express warranty of at least 60 days must be given in accordance with FAR 12.404(b)(2).
- c. Limitation of Liability. Except as otherwise provided by an express or implied warranty, the Contractor will not be liable to the ordering activity for consequential damages resulting from any defect or deficiencies in accepted items.

#### **4. TECHNICAL SERVICES**

The Contractor, without additional charge to the ordering activity, shall provide a hot line technical support number 1.814.238.0006 for the purpose of providing user assistance and guidance in the implementation of the software. The technical support number is available from 7am to 7pm eastern time.

#### **5. SOFTWARE MAINTENANCE**

- a. Software maintenance as it is defined:

Software Maintenance as a Product

Software maintenance as a product includes the publishing of bug/defect fixes via patches and updates/upgrades in function and technology to maintain the operability and usability of the software product. It may also include other no charge support that is included in the purchase price of the product in the commercial marketplace. No charge support includes items such as user blogs, discussion forums, on-line help libraries and FAQs (Frequently Asked Questions), hosted chat rooms, and limited telephone, email and/or web-based general technical support for user's self-diagnostics.

Software maintenance as a product does NOT include the creation, design, implementation, integration, etc. of a software package. These examples are considered software maintenance as a service.

Software Maintenance as a product is billed at the time of purchase.

Software Maintenance as a service

Software maintenance as a service creates, designs, implements, and/or integrates customized changes to software that solve one or more problems and is not included with the price of the software. Software maintenance as a service includes person-to-person communications regardless of the medium used to communicate: telephone support, on-line technical support, customized support, and/or technical expertise which are charged commercially. Software maintenance as a service is billed arrears in accordance with 31U.S.C. 3324.

Software maintenance as a service is billed in arrears in accordance with 31 U.S.C. 3324.

- b. Invoices for maintenance service should be submitted to the ordering agency on a quarterly or monthly basis (or as otherwise specified by the ordering activity), after the completion of such period. Maintenance charges must be paid in arrears (31 U.S.C. 3324). **PROMPT PAYMENT DISCOUNT, IF APPLICABLE, SHALL BE SHOWN ON THE INVOICE.**

## **6. PERIODS OF TERM LICENSES AND SOFTWARE MAINTENANCE**

- a. The Contractor shall honor orders for periods for the duration of the contract period or a lesser period of time.
- b. Term licenses and/or maintenance may be discontinued by the ordering activity on thirty (30) calendar days written notice to the Contractor.
- c. Annual Funding. When annually appropriated funds are cited on an order for term licenses and/or maintenance, the period of the term licenses and/or maintenance shall automatically expire on September 30 of the contract period, or at the end of the contract period, whichever occurs first. Renewal of the term licenses and/or maintenance orders citing the new appropriation shall be required, if the term licenses and/or maintenance is to be continued during any remainder of the contract period.
- d. Cross-Year Funding Within Contract Period. Where an ordering activity's specific appropriation authority provides for funds in excess of a 12 month (fiscal year) period, the ordering activity may place an order under this schedule contract for a period up to the expiration of the contract period, notwithstanding the intervening fiscal years.
- e. Ordering activities should notify the Contractor in writing thirty (30) calendar days prior to the expiration of an order, if the term licenses and/or maintenance is to be terminated at that time. Orders for the continuation of term licenses and/or maintenance will be required if the term licenses and/or maintenance is to be continued during the subsequent period.

## **7. CONVERSION FROM TERM LICENSE TO PERPETUAL LICENSE– NOT APPLICABLE to DocFinity On-Premise Solution**

- a. The ordering activity may convert term licenses to perpetual licenses for any or all software at any time following acceptance of software. At the request of the ordering activity the Contractor shall furnish, within ten (10) calendar days (or as otherwise specified by the ordering activity), for each software product that is contemplated for conversion, the total amount of conversion credits which have accrued while the software was on a term license and the date of the last update or enhancement.
- b. Conversion credits which are provided shall, within the limits specified, continue to accrue from one contract period to the next, provided the software remains on a term

license within the ordering activity.

- c. The term license for each software product shall be discontinued on the day immediately preceding the effective date of conversion from a term license to a perpetual license.
- d. The price the ordering activity shall pay will be the perpetual license price that prevailed at the time such software was initially ordered under a term license, or the perpetual license price prevailing at the time of conversion from a term license to a perpetual license, whichever is the less, minus an amount equal to \_\_% of all term license payments during the period that the software was under a term license within the ordering activity.

**8. TERM LICENSE CESSATION – NOT APPLICABLE to DocFinity On-Premise Solution**

- a. After a software product has been on a continuous term license for a period of \_\_\_\_ months, a fully paid-up, non-exclusive, perpetual license for the software product shall automatically accrue to the ordering activity. The period of continuous term license for automatic accrual of a fully paid-up perpetual license does not have to be achieved during a particular fiscal year; it is a written Contractor commitment which continues to be available for software that is initially ordered under this contract, until a fully paid-up perpetual license accrues to the ordering activity. However, should the term license of the software be discontinued before the specified period of the continuous term license has been satisfied, the perpetual license accrual shall be forfeited.
- b. The Contractor agrees to provide updates and maintenance service for the software after a perpetual license has accrued, at the MAS-awarded terms and conditions, if the licensee elects to order such services. Title to the software shall remain with the Contractor.

**9. UTILIZATION LIMITATIONS**

- a. Software acquisition is limited to commercial computer software defined in FAR Part 2.101.
- b. When acquired by the ordering activity, commercial computer software and related documentation so legend shall be subject to the following:
  - (1) Title to and ownership of the software and documentation shall remain with the Contractor, unless otherwise specified.
  - (2) Software licenses are by site and by ordering activity. An ordering activity is defined as a cabinet level or independent ordering activity. The software may be used by any subdivision of the ordering activity (service, bureau, division, command, etc.) that has access to the site the software is placed at, even if the subdivision did not participate in the acquisition of the software. Further, the software may be used on a sharing basis where multiple agencies have joint projects that can be satisfied by the use of the software placed at one ordering activity's site. This would allow other agencies access to one ordering activity's database. For ordering activity public domain databases, user agencies and third parties may use the computer program to enter, retrieve, analyze and present data. The user ordering activity will take appropriate action by instruction, agreement, or otherwise, to protect the Contractor's proprietary property with any third parties that are permitted access to the computer programs and documentation in connection with the user ordering activity's permitted use of the computer programs and documentation. For purposes of this section, all such permitted third parties shall be deemed agents of the user ordering activity.

- (3) Except as is provided in paragraph 9.b.(2) above, the ordering activity shall not provide or otherwise make available the software or documentation, or any portion thereof, in any form, to any third party without the prior written approval of the Contractor. Third parties do not include prime Contractors, subcontractors and agents of the ordering activity who have the ordering activity's permission to use the licensed software and documentation at the facility, and who have agreed to use the licensed software and documentation only in accordance with these restrictions. This provision does not limit the right of the ordering activity to use software, documentation, or information therein, which the ordering activity may already have or obtains without restrictions.
- (4) The ordering activity shall have the right to use the computer software and documentation with the computer for which it is acquired at any other facility to which that computer may be transferred, or in cases of Disaster Recovery, the ordering activity has the right to transfer the software to another site if the ordering activity site for which it is acquired is deemed to be unsafe for ordering activity personnel; to use the computer software and documentation with a backup computer when the primary computer is inoperative; to copy computer programs for safekeeping (archives) or backup purposes; to transfer a copy of the software to another site for purposes of benchmarking new hardware and/or software; and to modify the software and documentation or combine it with other software, provided that the unmodified portions shall remain subject to these restrictions.
- (5) "Commercial Computer Software" may be marked with the Contractor's standard commercial restricted rights legend, but the schedule contract and schedule pricelist, including this clause, "Utilization Limitations" are the only governing terms and conditions, and shall take precedence and supersede any different or additional terms and conditions included in the standard commercial legend.

**10. SOFTWARE CONVERSIONS:**

Full monetary credit will be allowed to the ordering activity when conversion from one version of the software to another is made as the result of a change in operating system, or from one computer system to another. Under a perpetual license, the purchase price of the new software shall be reduced by the amount that was paid to purchase the earlier version. Under a term license, conversion credits which accrued while the earlier version was under a term license shall carry forward and remain available as conversion credits which may be applied towards the perpetual license price of the new version.

**11. DESCRIPTIONS AND EQUIPMENT COMPATIBILITY**

The Contractor shall include, in the schedule pricelist, a complete description of each software product and a list of equipment on which the software can be used. Also, included shall be a brief, introductory explanation of the modules and documentation which are offered.

**12. RIGHT-TO-COPY PRICING– NOT APPLICABLE to DocFinity On-Premise Solution**

The Contractor shall propose pricing for right-to-copy licenses.

### **DocFinity On-Premise Pricing**

CDS offers the option to select DocFinity software licenses and maintenance contracts for on-site installation, using the customer's server and network infrastructure.

### **On-Premise User Licenses**

CDS proposes tiered pricing for its on-premise offering. Pricing tiers reflect significant volume discounts based on increased numbers of licensed users. Additional user subscriptions can be purchased at rates included in the price list for each tier.

### **On-Premise Pricing Assumptions and Methodologies**

We license DocFinity on a per concurrent user basis, versus an individual named basis. While DocFinity allows for individual user names, security and authentication, not all users may need access to the system at the same time. In essence, we provide unlimited number of named users at the concurrency level procured. Each customer's usage will be different based on how the system is used. Historically, we have found that a ratio of about one concurrent user to four named users is preferred by our customers. Depending on the access required and the extent of their individual duties, some staff may require full-time access to the system and others may require less frequent use. For those cases, customers can reserve a license pool which guarantees access to certain users or group of users with critical roles.

CDS offers comprehensive pricing that includes these components:

- These software modules, licensed separately:
  - DocFinity Enterprise Core Engine
  - DocFinity Exporter
  - DocFinity Connect
  - DocFinity Fax integration
  - Print to DocFinity
  - DocFinity BPM/Workflow
  - DocFinity COLD
  - DocFinity Enterprise Search
  - DocFinity eForms
  - DocFinity Records Management
  - DocFinity Dashboards
  - DocFinity Self-Service Gateway
- Three instances as follows; although additional environments like training, preproduction and others can be provided separately at an additional cost:
  - Production system running against one instance of production database tables
  - Development/test system running against one instance of development/test database tables
  - Back-up system running against one instance of back-up database tables
- Annual Maintenance Contract sold separately
- Full system and application support and maintenance
- Help desk support

Services Not Included: Because the on-premise deployment uses the entity's own hardware, systems software and infrastructure, related maintenance are neither included nor provided.

## **On-Premise Licensing Option Product Descriptions**

The following provides a brief description of the individual DocFinity modules.

### **DocFinity Software Modules**

#### **DocFinity Core Module**

The DocFinity Core module is the foundation of the product suite. This module categorizes information so documents can be retrieved quickly and easily; makes virtual copies of current documents, adding them to batches for indexing; uses blind entry fields for secure information; and checks data for validity against preconfigured criteria. This module also converts paper documents to digital files to ease handling, speed processing and save space and provides instantaneous, on-screen visibility for single documents or complete files. Word searches can provide intuitive inquiry of active databases and archives. The Core module gives complete control over access, task assignment and monitoring, load balancing and security from a single, intuitive interface and includes object, index and email importers to automate the import of virtually any file type directly into the system or a workflow process, even from other document management systems. Users can print multiple stored documents without having to open them, reducing network traffic and increasing productivity. Changes to documents, files, metadata and markup can be tracked, preserving the history and evolution of a document and allowing revision to previous versions. DocFinity can integrate with Microsoft Office to allow Word documents to be directly imported to DocFinity and to open documents stored in DocFinity in Word. License is perpetual once paid in full and accessible through a multi-user Access Key. Additional Access Keys can be requested to accommodate additional purchased user licenses.

#### **DocFinity Exporter**

DocFinity Exporter takes user-defined collections of documents and extracts the files and associated database records that identify those documents. The extracted content — written to the network folder or to the CD/DVD drive of choice — then can be used to transfer document collections reliably to third parties and other systems. License is perpetual once paid in full and accessible through a multi-user Access Key. Additional Access Keys can be requested to accommodate additional purchased user licenses.

#### **DocFinity Connect**

DocFinity Connect calls documents from the database with a single keystroke and integrates DocFinity into current line of business applications without programming. License is perpetual once paid in full and accessible through a multi-user Access Key. Additional Access Keys can be requested to accommodate additional purchased user licenses.

#### **Fax Integration**

Fax Integration connects with electronic fax servers and applications. License is perpetual once paid in full and accessible through a multi-user Access Key. Additional Access Keys can be requested to accommodate additional purchased user licenses.

#### **Print to DocFinity**

Print to DocFinity indexes documents into the DocFinity repository from their native applications by selecting DocFinity PDF Printer as the printer. The PDF copy opens so you can provide indexing metadata according to a preselected indexing scheme. License is perpetual once paid in full and accessible through a multi-user Access Key. Additional Access Keys can be requested to accommodate additional purchased user licenses.

### **BPM Workflow**

Business Process Management (BPM) Workflow standardizes and expedites processes by pushing and pulling data and files from email, voice mail, faxes and administrative systems to people and systems. This allows you to easily design and modify robust workflows through intuitive drag-and-drop, point-and-click designer. License is perpetual once paid in full and accessible through a multi-user Access Key. Additional Access Keys can be requested to accommodate additional purchased user licenses.

### **COLD**

COLD Monitors mainframes, network servers, UNIX servers, and print spoolers to capture print streams in ASCII, EBCDIC, IBM AFP, Xerox Metacode/DJDE, Postscript/PDF, and PCL, reducing expenses by eliminating unnecessary printing, storage, and mailing costs. License is perpetual once paid in full and accessible through a multi-user Access Key. Additional Access Keys can be requested to accommodate additional purchased user licenses.

### **Enterprise Search**

Enterprise Search queries the repository for text matches in nontext file formats such as PDF, TIFF, HTML and JPEG. It also locates structured and unstructured data contained in files and other documents and combines keyword and full-text searching. License is perpetual once paid in full and accessible through a multi-user Access Key. Additional Access Keys can be requested to accommodate additional purchased user licenses.

### **eForms**

eForms lets users design simple and complex electronic forms. It also allows forms to automatically trigger new workflow processes on submission and to be integrated into existing websites, portals or any other system and software. License is perpetual once paid in full and accessible through a multi-user Access Key. Additional Access Keys can be requested to accommodate additional purchased user licenses.

### **Records Management**

The Records Management module creates clear, auditable trails of evidence for every process performed on every record in the system. This module groups related documents into record series and provides mechanisms to automate management in basic retention policies including rules to map records to retention policies, approval process or record disposal, and rendering records in noneditable formats. It provides advanced retention policies including legal hold. License is perpetual once paid in full and accessible through a multi-user Access Key. Additional Access Keys can be requested to accommodate additional purchased user licenses.

### **Dashboards**

The purpose of the DocFinity Dashboard module is to provide a clear picture of how the system is working and specifically how a business is functioning as it relates to DocFinity through comprehensive metrics of performance. License is perpetual once paid in full and accessible through a multi-user Access Key. Additional Access Keys can be requested to accommodate additional purchased user licenses.

Figure 1 provides product and price information relative to the aforementioned DocFinity software modules.

<b>SIN</b>	<b>Manufacturer Name</b>	<b>MFR Part No.</b>	<b>Product Name</b>	<b>GSA Price</b>
518210ERM	Companion Data Services, LLC	DCM-100	DocFinity Core Module	\$37,647.80
518210ERM	Companion Data Services, LLC	DEM-101	DocFinity Exporter	\$9,411.95
518210ERM	Companion Data Services, LLC	DXM-102	DocFinity Connect	\$4,705.98
518210ERM	Companion Data Services, LLC	DFI-103	Fax Integration	\$4,705.98
518210ERM	Companion Data Services, LLC	DPT-104	Print to DocFinity	\$4,705.98

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DWF-105	BPM Workflow	\$23,529.88
518210ERM	Companion Data Services, LLC	DLD-106	COLD	\$18,823.90
518210ERM	Companion Data Services, LLC	DES-107	Enterprise Search	\$23,529.88
518210ERM	Companion Data Services, LLC	DEF-108	eForms	\$18,823.90
518210ERM	Companion Data Services, LLC	DRM-109	Records Management	\$23,529.88
518210ERM	Companion Data Services, LLC	DDB-110	Dashboards	\$18,823.90

*Figure 1. DocFinity On-Premise Software Module Pricing*

### **DocFinity Self Service Gateway – Consumption Model**

This module provides external user access to documents, electronic forms and searches from externally facing portals without the need of being registered users of DocFinity and consuming an official DocFinity Standard Concurrent User. Pricing includes a fixed licensed fee per month, plus a dynamic user fee dependent on actual feature consumption by each named user per month. Actions are tracked for each named user and billed monthly based on the number of actions performed by those users. Tracked actions include the following: viewing a document, submitting a form, executing a search and starting a business process. An Active User is defined as a unique user performing 100 actions per month or less. A Power User is defined as a unique user performing more than 100 actions per month.

Figure 2 provides product and price information relative to the DocFinity Self Service Gateway Consumption Model.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DSSGCON-101	Self Service Gateway Consumption Model License	\$188.24
518210ERM	Companion Data Services, LLC	DSSGCON -102	Self Service Gateway Consumption Model Active User	\$1.50
518210ERM	Companion Data Services, LLC	DSSGCON-103	Self Service Gateway Consumption Model Power User	\$4.71

*Figure 2. DocFinity Self Service Gateway Consumption Model Fees*

### **DocFinity Self Service Gateway – Perpetual Model**

This module provides external user access to documents, electronic forms and searches from externally facing portals without the need of being registered users of DocFinity and consuming an official DocFinity Standard Concurrent User. Pricing includes a one-time perpetual license fee and a tiered user fee structure billed annually based on the number of unique users allowed to access the Self Service Gateway each month.

Figure 3 provides one-time license pricing for the DocFinity Self Service Gateway Perpetual Model.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DSSGPM-101	Self Service Gateway Perpetual Model License	\$23,529.88

*Figure 3. DocFinity Self Service Gateway Perpetual Model One-Time License Fee*

Figure 4 provides user fee pricing relative to the DocFinity Self Service Gateway Perpetual Model. Self Service Gateway perpetual model user fees are billed annually, and are calculated based on the total number of unique users allowed to access the Self Service Gateway each month.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DSSGPM -102	Self Service Gateway Perpetual Model 1-1,000 Users	\$33.88
518210ERM	Companion Data Services, LLC	DSSGPM -103	Self Service Gateway Perpetual Model 1,001-5,000 Users	\$22.59
518210ERM	Companion Data Services, LLC	DSSGPM-104	Self Service Gateway Perpetual Model 5,001+ Users	\$11.29

*Figure 4. DocFinity Self Service Gateway Perpetual Model User Fees*

### DocFinity User Pricing

Concurrent users are licensed to access the instance of DocFinity database tables through DocFinity Web Client capabilities. Any active Web Client item is considered a logged-in concurrent user. The number of concurrent users licensed represents the total number of system users that can log into and use the system at any given time. System access is restricted to the total number of concurrent users licensed. A concurrent user license is required for anyone to access, use and/or execute system functionality. Figure 5 details DocFinity on-premise concurrent user pricing.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DU-111-1-25	1 through 25	\$800.02
518210ERM	Companion Data Services, LLC	DU-111-26-50	26 through 50	\$705.90
518210ERM	Companion Data Services, LLC	DU-111-51-1000	51 through 100	\$611.78
518210ERM	Companion Data Services, LLC	DU-111-101-250	101 through 250	\$470.60
518210ERM	Companion Data Services, LLC	DU-111-251-750	251 through 750	\$235.30
518210ERM	Companion Data Services, LLC	DU-111-751-1000	751 through 1000	\$141.18
518210ERM	Companion Data Services, LLC	DU-111-1000+	1001 and beyond	\$94.12

*Figure 5. DocFinity On-Premise User Pricing*

### DocFinity Maintenance Services

DocFinity software maintenance services consist of the annual maintenance program or one-off support request.

#### DocFinity Annual Maintenance Program

The DocFinity Annual Maintenance Program provides the following services: updated versions of the licensed product, patched/fixed versions of the licensed product, industry practiced help desk support for troubleshooting, access to help desk support through the web submission process, email and phone, access to DocFinity the FTP

site, web-based/remote access help desk and troubleshooting support, options to participate in BETA-user/testing, access to DocFinity Knowledge Base and customer discussion forums.

Figure 6 details the Annual Maintenance for DocFinity Software Modules (DAM-112-1 through DAM-112-11). Maintenance will be billed annually at the rates defined in the figure below.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DAM-112-1	DocFinity Core Module	\$7,529.56
518210ERM	Companion Data Services, LLC	DAM-112-2	DocFinity Exporter	\$1,882.39
518210ERM	Companion Data Services, LLC	DAM-112-3	DocFinity Connect	\$941.20
518210ERM	Companion Data Services, LLC	DAM-112-4	Fax Integration	\$941.20
518210ERM	Companion Data Services, LLC	DAM-112-5	Print to DocFinity	\$941.20
518210ERM	Companion Data Services, LLC	DAM-112-6	BPM Workflow	\$4,705.98
518210ERM	Companion Data Services, LLC	DAM-112-7	COLD	\$3,764.78
518210ERM	Companion Data Services, LLC	DAM-112-8	Enterprise Search	\$4,705.98
518210ERM	Companion Data Services, LLC	DAM-112-9	eForms	\$3,764.78
518210ERM	Companion Data Services, LLC	DAM-112-10	Records Management	\$4,705.98
518210ERM	Companion Data Services, LLC	DAM-112-11	Dashboards	\$3,764.78

*Figure 6. Annual Maintenance DocFinity Software Modules (DAM-112-1 to DAM-112-11)*

Figure 7 details the Annual Maintenance pricing for DocFinity Concurrent User Licenses DAM-112-U (1-1000+). Maintenance will be billed annually at the rates defined in the figure below.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DAM-112-U	1 through 25	\$160.00
518210ERM	Companion Data Services, LLC	DAM-112-U	26 through 50	\$141.18
518210ERM	Companion Data Services, LLC	DAM-112-U	51 through 100	\$122.36
518210ERM	Companion Data Services, LLC	DAM-112-U	101 through 250	\$94.12
518210ERM	Companion Data Services, LLC	DAM-112-U	251 through 750	\$47.06
518210ERM	Companion Data Services, LLC	DAM-112-U	751 through 1000	\$28.24

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DAM-112-U	1001 and beyond	\$18.82

*Figure 7. Annual Maintenance for DocFinity User Licenses DAM-112-U (1-1000+)*

Figure 8 details the Annual Maintenance pricing for DocFinity Self Service Gateway Consumption Model No. DSSGCON-M. Maintenance will be billed monthly at the rates defined in the figure below.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DSSGCON-M101	Consumption Model Self Service Gateway License Maintenance	\$37.65
518210ERM	Companion Data Services, LLC	DSSGCON-M102	Consumption Model Self Service Gateway Active User Maintenance per User	\$0.30
518210ERM	Companion Data Services, LLC	DSSGCON-M103	Consumption Model Self Service Gateway Power User Maintenance per User	\$0.94

*Figure 8. DocFinity On-Premise Monthly Maintenance Pricing - Self-Service Gateway Consumption Model*

Figure 9 details the Annual Maintenance pricing for DocFinity Self Service Gateway Perpetual Model No. DSSGPM-M. Maintenance will be billed annually at the rates defined in the figure below.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DSSGPM-M101	Perpetual Model Self Service Gateway Annual Maintenance	\$4,705.98
518210ERM	Companion Data Services, LLC	DSSGPM-M102	Perpetual Model Self Service Gateway 1-1,000 Users Annual Maintenance per User	\$6.78
518210ERM	Companion Data Services, LLC	DSSGPM-M103	Self Service Gateway Perpetual Model 1,001-5,000 Users Annual Maintenance per User	\$4.52
518210ERM	Companion Data Services, LLC	DSSGPM-M104	Self Service Gateway Perpetual Model 5,001+ Users Annual Maintenance per User	\$2.26

*Figure 9. DocFinity On-Premise - Annual Maintenance Pricing Self-Service Gateway Perpetual Model*

**TERMS AND CONDITIONS APPLICABLE TO DOCFINITY SOFTWARE AS A SERVICE  
CLOUD SOLUTION (SAAS) LICENSING OPTION – SIN 518210ERM**

**1. INSPECTION/ACCEPTANCE**

The Contractor shall only tender for acceptance those items that conform to the requirements of this contract. The ordering activity reserves the right to inspect or test any software that has been tendered for acceptance. The ordering activity may require repair or replacement of nonconforming software at no increase in contract price. The ordering activity must exercise its post-acceptance rights (1) within a reasonable time after the defect was discovered or should have been discovered; and (2) before any substantial change occurs in the condition of the software, unless the change is due to the defect in the software.

**2. ENTERPRISE USER LICENSE AGREEMENTS REQUIREMENTS (EULA)**

The Contractor shall provide all Enterprise User License Agreements in an editable Microsoft Office (Word) format.

**3. GUARANTEE/WARRANTY**

- a. Unless specified otherwise in this contract, the Contractor's standard commercial guarantee/warranty as stated in the contract's commercial pricelist will apply to this contract.

CDS warrants that the current version of the Service will materially conform to the then current written or electronic documentation provided by CDS in connection with the Service. In the event of a breach of this warranty by CDS, CDS will, at its expense, use commercially reasonable efforts to promptly cause the Service to conform.

You represent and warrant that all Customer Documents/Data and associated content provided to CDS in connection with your use of the Site and the Service: (i) is owned by you, or you have the full right to provide the Customer Documents/Data to CDS; (ii) does not infringe or misappropriate any copyright, trademark, trade secret or other intellectual property right; (iii) does not violate any person's right of privacy or publicity; and (iv) does not contain any unlawful, obscene, defamatory or libelous material. You further represent and warrant that your use of Customer Documents/Data in connection with the Service is not in breach of any covenant or obligation of confidentiality that you have to any other person or entity. You are solely responsible for the Customer Documents/Data, and acknowledge that CDS has no responsibility or intent to review or monitor any Customer Documents/Data.

You shall be solely responsible for your use of the Service, and, except as otherwise agreed in writing by the parties, for maintaining backup copies of the Customer Documents/Data. You acknowledge and agree that the Service is strictly a tool to be used in conjunction with good and reasonable business judgment by competent personnel.

The Service may contain features, functionality and information that are provided through or by third-party content, software, web sites, and/or systems ("Third-Party Materials"). Your use and access of these features and functionality are subject to the terms published or otherwise made available by the third-party providers of Third-Party Materials. CDS has no

responsibility for any Third-Party Materials that are incorporated into the Service by Customer, and Customer irrevocably waives any claim against CDS with respect to such Third-Party Materials that are incorporated into the Service by Customer. The foregoing waiver shall not be applicable to any Third-Party Materials that are incorporated or integrated into the Services, Site or Software by CDS or anyone acting on its behalf.

CDS does not warrant that the Service will operate without interruption or error-free. To the extent that data is being transmitted over the internet hereunder, you acknowledge that CDS has no control over the functioning of the internet, and CDS makes no representations or warranties of any kind regarding the performance of the internet. EXCEPT AS EXPRESSLY SET FORTH IN THIS AGREEMENT, CDS MAKES NO WARRANTIES, EXPRESS OR IMPLIED, AND EXPRESSLY DISCLAIMS ALL IMPLIED WARRANTIES, INCLUDING BUT NOT LIMITED TO ANY IMPLIED WARRANTIES OF MERCHANTABILITY, NONINFRINGEMENT, OR FITNESS FOR A PARTICULAR PURPOSE OR ANY WARRANTIES ARISING AS A RESULT OF CUSTOMER USAGE IN THE TRADE OR BY COURSE OF DEALING. THIS CLAUSE DOES NOT LIMIT OR DISCLAIM ANY OF THE WARRANTIES SPECIFIED IN THE GSA SCHEDULE CONTRACT UNDER FAR 52.212-4(O). IN THE EVENT OF A BREACH OF WARRANTY, THE U.S. GOVERNMENT RESERVES ALL RIGHTS AND REMEDIES UNDER THE CONTRACT, THE FEDERAL ACQUISITION REGULATIONS, AND THE CONTRACT DISPUTES ACT, 41 U.S.C. 7101-7109.

- b. The Contractor warrants and implies that the items delivered hereunder are merchantable and fit for use for the particular purpose described in this contract. If no implied warranties are given, an express warranty of at least 60 days must be given in accordance with FAR 12.404(b)(2).
- c. Limitation of Liability. Except as otherwise provided by an express or implied warranty, the Contractor will not be liable to the ordering activity for consequential damages resulting from any defect or deficiencies in accepted items.

#### **4. TECHNICAL SERVICES**

The Contractor, without additional charge to the ordering activity, shall provide a hot line technical support number 803-264-3610 for the purpose of providing user assistance and guidance in the implementation of the software. The technical support number is available from 9 AM to 5 PM eastern time.

#### **5. SOFTWARE MAINTENANCE**

- a. Software maintenance as it is defined:

Software Maintenance as a Product

Software maintenance as a product includes the publishing of bug/defect fixes via patches and updates/upgrades in function and technology to maintain the operability and usability of the software product. It may also include other no charge support that is included in the purchase price of the product in the commercial marketplace. No charge support includes items such as user blogs, discussion forums, on-line help libraries and FAQs (Frequently Asked Questions), hosted chat rooms, and limited telephone, email and/or web-based general technical support for user's self-diagnostics.

Software maintenance as a product does NOT include the creation, design, implementation, integration, etc. of a software package. These examples are considered software maintenance as a service.

Software Maintenance as a product is billed at the time of purchase.

Software Maintenance as a service

Software maintenance as a service creates, designs, implements, and/or integrates customized changes to software that solve one or more problems and is not included with the price of the software. Software maintenance as a service includes person-to- person communications regardless of the medium used to communicate: telephone support, on- line technical support, customized support, and/or technical expertise which are charged commercially. Software maintenance as a service is billed arrears in accordance with 31U.S.C. 3324.

Software maintenance as a service is billed in arrears in accordance with 31 U.S.C. 3324.

- b. Invoices for maintenance service should be submitted to the ordering agency on a quarterly or monthly basis (or as otherwise specified by the ordering activity), after the completion of such period. Maintenance charges must be paid in arrears (31 U.S.C. 3324). PROMPT PAYMENT DISCOUNT, IF APPLICABLE, SHALL BE SHOWN ON THE INVOICE.

**6. PERIODS OF TERM LICENSES AND SOFTWARE MAINTENANCE**

- a. The Contractor shall honor orders for periods for the duration of the contract period or a lesser period of time.
- b. Term licenses and/or maintenance may be discontinued by the ordering activity on thirty (30) calendar days written notice to the Contractor.
- c. Annual Funding. When annually appropriated funds are cited on an order for term licenses and/or maintenance, the period of the term licenses and/or maintenance shall automatically expire on September 30 of the contract period, or at the end of the contract period, whichever occurs first. Renewal of the term licenses and/or maintenance orders citing the new appropriation shall be required, if the term licenses and/or maintenance is to be continued during any remainder of the contract period.

- d. Cross-Year Funding Within Contract Period. Where an ordering activity's specific appropriation authority provides for funds in excess of a 12 month (fiscal year) period, the ordering activity may place an order under this schedule contract for a period up to the expiration of the contract period, notwithstanding the intervening fiscal years.
- e. Ordering activities should notify the Contractor in writing thirty (30) calendar days prior to the expiration of an order, if the term licenses and/or maintenance is to be terminated at that time. Orders for the continuation of term licenses and/or maintenance will be required if the term licenses and/or maintenance is to be continued during the subsequent period.

**7. CONVERSION FROM TERM LICENSE TO PERPETUAL LICENSE– NOT APPLICABLE to DocFinity Software as a Service Cloud Solution (SaaS)**

- a. The ordering activity may convert term licenses to perpetual licenses for any or all software at any time following acceptance of software. At the request of the ordering activity the Contractor shall furnish, within ten (10) calendar days (or as otherwise specified by the ordering activity), for each software product that is contemplated for conversion, the total amount of conversion credits which have accrued while the software was on a term license and the date of the last update or enhancement.
- b. Conversion credits which are provided shall, within the limits specified, continue to accrue from one contract period to the next, provided the software remains on a term license within the ordering activity.
- c. The term license for each software product shall be discontinued on the day immediately preceding the effective date of conversion from a term license to a perpetual license.
- d. The price the ordering activity shall pay will be the perpetual license price that prevailed at the time such software was initially ordered under a term license, or the perpetual license price prevailing at the time of conversion from a term license to a perpetual license, whichever is the less, minus an amount equal to N/A% of all term license payments during the period that the software was under a term license within the ordering activity.

**8. TERM LICENSE CESSATION– NOT APPLICABLE to DocFinity Software as a Service Cloud Solution (SaaS)**

- a. After a software product has been on a continuous term license for a period of N/A months, a fully paid-up, non-exclusive, perpetual license for the software product shall automatically accrue to the ordering activity. The period of continuous term license for automatic accrual of a fully paid-up perpetual license does not have to be achieved during a particular fiscal year; it is a written Contractor commitment which continues to be available for software that is initially ordered under this contract, until a fully paid-up perpetual license accrues to the ordering activity. However, should the term license of the software be discontinued before the specified period of the continuous term license has been satisfied, the perpetual license accrual shall be forfeited.
- b. The Contractor agrees to provide updates and maintenance service for the software after a perpetual license has accrued, at the MAS-awarded terms and conditions, if the licensee elects to order such services. Title to the software shall remain with the Contractor.

## 9. UTILIZATION LIMITATIONS

- a. Software acquisition is limited to commercial computer software defined in FAR Part 2.101.
- b. When acquired by the ordering activity, commercial computer software and related documentation so legend shall be subject to the following:
  - (1) Title to and ownership of the software and documentation shall remain with the Contractor, unless otherwise specified.
  - (2) Software licenses are by site and by ordering activity. An ordering activity is defined as a cabinet level or independent ordering activity. The software may be used by any subdivision of the ordering activity (service, bureau, division, command, etc.) that has access to the site the software is placed at, even if the subdivision did not participate in the acquisition of the software. Further, the software may be used on a sharing basis where multiple agencies have joint projects that can be satisfied by the use of the software placed at one ordering activity's site. This would allow other agencies access to one ordering activity's database. For ordering activity public domain databases, user agencies and third parties may use the computer program to enter, retrieve, analyze and present data. The user ordering activity will take appropriate action by instruction, agreement, or otherwise, to protect the Contractor's proprietary property with any third parties that are permitted access to the computer programs and documentation in connection with the user ordering activity's permitted use of the computer programs and documentation. For purposes of this section, all such permitted third parties shall be deemed agents of the user ordering activity.
  - (3) Except as is provided in paragraph 9.b.(2) above, the ordering activity shall not provide or otherwise make available the software or documentation, or any portion thereof, in any form, to any third party without the prior written approval of the Contractor. Third parties do not include prime Contractors, subcontractors and agents of the ordering activity who have the ordering activity's permission to use the licensed software and documentation at the facility, and who have agreed to use the licensed software and documentation only in accordance with these restrictions. This provision does not limit the right of the ordering activity to use software, documentation, or information therein, which the ordering activity may already have or obtains without restrictions.
  - (4) The ordering activity shall have the right to use the computer software and documentation with the computer for which it is acquired at any other facility to which that computer may be transferred, or in cases of Disaster Recovery, the ordering activity has the right to transfer the software to another site if the ordering activity site for which it is acquired is deemed to be unsafe for ordering activity personnel; to use the computer software and documentation with a backup computer when the primary computer is inoperative; to copy computer programs for safekeeping (archives) or backup purposes; to transfer a copy of the software to another site for purposes of benchmarking new hardware and/or software; and to modify the software and documentation or combine it with other software, provided that the unmodified portions shall remain subject to these restrictions.

- (5) "Commercial Computer Software" may be marked with the Contractor's standard commercial restricted rights legend, but the schedule contract and schedule pricelist, including this clause, "Utilization Limitations" are the only governing terms and conditions, and shall take precedence and supersede any different or additional terms and conditions included in the standard commercial legend.

**10. SOFTWARE CONVERSIONS– NOT APPLICABLE to DocFinity Software as a Service Cloud Solution (SaaS)**

Full monetary credit will be allowed to the ordering activity when conversion from one version of the software to another is made as the result of a change in operating system, or from one computer system to another. Under a perpetual license, the purchase price of the new software shall be reduced by the amount that was paid to purchase the earlier version. Under a term license, conversion credits which accrued while the earlier version was under a term license shall carry forward and remain available as conversion credits which may be applied towards the perpetual license price of the new version.

**11. DESCRIPTIONS AND EQUIPMENT COMPATIBILITY**

The Contractor shall include, in the schedule pricelist, a complete description of each software product and a list of equipment on which the software can be used. Also, included shall be a brief, introductory explanation of the modules and documentation which are offered.

**12. RIGHT-TO-COPY PRICING–NOT APPLICABLE to DocFinity Software as a Service Cloud Solution (SaaS)**

The Contractor shall propose pricing for right-to-copy licenses.

**DocFinity Software as a Service (SaaS) Pricing**

This is the recommended option for entities which prefer zero capital expenditure, zero maintenance costs and lower personnel expenses with sophisticated needs to use the DocFinity full suite. All server-level hardware and software as well as maintenance and system security are provided by CDS and included in our simple SaaS subscription pricing.

**SaaS Subscription**

CDS proposes tiered pricing for its SaaS offering. Pricing tiers reflect significant volume discounts based on increased numbers of licensed users. These rates are proposed as Firm Fixed Price for five years. Additional user subscriptions can be purchased at rates included in the tiered-pricing structure in the price list provided in Figure 11.

**SaaS Pricing Assumptions and Methodologies**

Our full DocFinity functionality is priced on a monthly price per concurrent user basis. Individual entities may have the flexibility of adjusting the number of licenses during the course of the year and paying only for the contracted licenses each month. This option is negotiated on a case-by-case basis.

The number of concurrent users can easily scale up over time as you further deploy and use our DocFinity system. You are also provided the flexibility to decrease the number of licenses during seasonal periods where less usage is expected.

We license DocFinity on a per concurrent user basis, instead of an individual named basis. While DocFinity allows for individual user names, security and authentication, not all users may need access to the system at the same time. In essence, we provide an unlimited number of named users at the concurrency level procured. Each customer’s usage will be different based on how the system is used. Historically, we have found that a ratio of about one concurrent user to four named users is often preferred. Depending on the access required and the extent of their individual duties, some staff may require full-time access to the system and others may require less frequent use. For those cases, customers can reserve a license pool which guarantees access to certain users or group of users with critical roles.

Our offering provides significant price reductions for an increased number of licensed users. As seen on our proposed pricing tables, the price per concurrent user decreases by close to 60 percent as you increase the number of licenses to 500. The reduction percentage gets significantly greater as the number of concurrent users further increases.

Monthly billings are based on the number of licensed concurrent users per month for the desired period.

Pricing is comprehensive and includes the following:

- All hardware and software infrastructure to support the comprehensive, out-of-the-box functionality of DocFinity
- Full system and application support and maintenance
- Help desk support
- One terabyte (TB) of storage; additional TB of storage can be purchased for the monthly price listed in the price list shown in Figure 12.
- Two instances as follows:
  - Production system running against one instance of the production database tables
  - Test and Quality Assurance system running against one instance of the development/test database tables

Additional environments like development, training, preproduction and others can be provided separately at an additional cost.

Figure 10 is an overview of the solution components provided by CDS and devices and connectivity provided by Government entities.

Companion Data Services Provides		Entities Provide
Solution Components	Services for all Solution Components	
Application Software	<ul style="list-style-type: none"> <li>• Provisioning</li> <li>• Hosting</li> <li>• Installation</li> <li>• Maintenance</li> <li>• Support</li> </ul>	<ul style="list-style-type: none"> <li>• Personal computers</li> <li>• Mobile devices</li> <li>• Scanners</li> <li>• Printers</li> </ul>
Server Hardware		
Server Operating System		
Server Data Base		

Companion Data Services Provides		Entities Provide
Solution Components	Services for all Solution Components	
Server Data Storage (starting at 1TB) at unlimited Input / Output requests (I/O)	<ul style="list-style-type: none"> <li>• Upgrades</li> <li>• Updates</li> <li>• Warranty</li> <li>• Repairs</li> <li>• Operations</li> <li>• Monitoring</li> <li>• Physical security</li> <li>• Data security including antivirus protection</li> <li>• Data backup</li> <li>• Disaster recovery</li> <li>• Performance tuning</li> </ul>	<ul style="list-style-type: none"> <li>• Compatible web browser</li> <li>• Internet connection</li> </ul>
Server Application Software Storage as needed		

Figure 10. SaaS Deployment Summary

### SaaS Licensing Option Product Descriptions

SaaS subscription fees entitle the entity to use the full functionality of DocFinity. Other items described below such as Optical Character Recognition and the DocFinity Self Service Gateway are offered as options.

### DocFinity Maintenance for SaaS Deployment:

SaaS subscription fees entitle the entity to receive continuous support on all solution components including updates and upgrades at no additional cost.

### DocFinity SaaS Solution

Our DocFinity SaaS solution hosts customer data in an Amazon Web Services (AWS) facility in the United States. AWS I/O fees are directly reflected to DocFinity users as a pass-through. Figure 11 details the DocFinity SaaS product and concurrent user pricing per month.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DPuC SaaS 1-50	1-50 Concurrent Users Per Month	\$127.48
518210ERM	Companion Data Services, LLC	DPuC SaaS 51-100	51-100 Concurrent Users Per Month	\$123.34
518210ERM	Companion Data Services, LLC	DPuC SaaS 101-150	101-150 Concurrent Users Per Month	\$106.56
518210ERM	Companion Data Services, LLC	DPuC SaaS 151-200	151-200 Concurrent Users Per Month	\$103.91
518210ERM	Companion Data Services, LLC	DPuC SaaS 201-250	201-250 Concurrent Users Per Month	\$96.83
518210ERM	Companion Data Services, LLC	DPuC SaaS 201-251	251-300 Concurrent Users Per Month	\$94.87

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DPuC SaaS 301-350	301-350 Concurrent Users Per Month	\$92.72
518210ERM	Companion Data Services, LLC	DPuC SaaS 351-400	351-400 Concurrent Users Per Month	\$91.67
518210ERM	Companion Data Services, LLC	DPuC SaaS 401-450	401-450 Concurrent Users Per Month	\$90.24
518210ERM	Companion Data Services, LLC	DPuC SaaS 451-500	451-500 Concurrent Users Per Month	\$84.10
518210ERM	Companion Data Services, LLC	DPuC SaaS 501-600	501-600 Concurrent Users Per Month	\$76.39
518210ERM	Companion Data Services, LLC	DPuC SaaS 601-700	601-700 Concurrent Users Per Month	\$75.27
518210ERM	Companion Data Services, LLC	DPuC SaaS 701-800	701-800 Concurrent Users Per Month	\$67.40
518210ERM	Companion Data Services, LLC	DPuC SaaS 801-900	801-900 Concurrent Users Per Month	\$65.41
518210ERM	Companion Data Services, LLC	DPuC SaaS 901-1000	901-1000 Concurrent Users Per Month	\$61.93
518210ERM	Companion Data Services, LLC	DPuC SaaS 1001-1250	1001-1250 Concurrent Users Per Month	\$54.42
518210ERM	Companion Data Services, LLC	DPuC SaaS 1251-1500	1251-1500 Concurrent Users Per Month	\$48.39
518210ERM	Companion Data Services, LLC	DPuC SaaS 1501-1750	1501-1750 Concurrent Users Per Month	\$46.90
518210ERM	Companion Data Services, LLC	DPuC SaaS 1751-2000	1751-2000 Concurrent Users Per Month	\$42.92
518210ERM	Companion Data Services, LLC	DPuC SaaS 2001-2500	2001-2500 Concurrent Users Per Month	\$41.56
518210ERM	Companion Data Services, LLC	DPuC SaaS 2501-3000	2501-3000 Concurrent Users Per Month	\$38.01
518210ERM	Companion Data Services, LLC	DPuC SaaS 3001-3500	3001-3500 Concurrent Users Per Month	\$31.29
518210ERM	Companion Data Services, LLC	DPuC SaaS 3501-4000	3501-4000 Concurrent Users Per Month	\$26.82

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DPuC SaaS 4001-4500	4001-4500 Concurrent Users Per Month	\$22.35
518210ERM	Companion Data Services, LLC	DPuC SaaS 4501-5000	4501-5000 Concurrent Users Per Month	\$17.88
518210ERM	Companion Data Services, LLC	DPuC SaaS 5001+	5001+ Concurrent Users Per Month	\$13.41

*Figure 11. SaaS DocFinity Concurrent User Pricing per Month*

## Optional DocFinity SaaS Products

### SaaS Storage

CDS SaaS pricing is comprehensive and includes 1TB of storage; additional TB of storage can be purchased for the monthly price indicated in Figure 12.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DSTS	Additional TB Data Storage	\$98.83

*Figure 12. SaaS Additional Data Storage Pricing*

### DocFinity Intelligent Capture OCR for SaaS Deployment

Intelligent Capture Optical Character Recognition (OCR) services include these capabilities:

- Extracts content, eliminating — or drastically reducing — the need for manual entry
- Launches workflows and business processes based on extracted data
- Offers intelligent recognition, with the ability to learn where data is held in specific documents
- Eliminates the need for designing templates or identifying zones
- Extracts lengthy detail from line items

DocFinity Intelligent Capture feature is priced based on pages processed per year, with no roll-over to the following year. The software component is installed on AWS servers, which CDS manages and secures. Figure 13 details the DocFinity Intelligent Capture for SaaS Deployment product and price information.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	OCR-IC-101	DocFinity Intelligent Capture OCR - 360K	\$25,492.27
518210ERM	Companion Data Services, LLC	OCR-IC-102	DocFinity Intelligent Capture OCR - 480K	\$30,321.55
518210ERM	Companion Data Services, LLC	OCR-IC-103	DocFinity Intelligent Capture OCR - 720K	\$38,317.94

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	OCR-IC-104	DocFinity Intelligent Capture OCR - 960K	\$46,314.33
518210ERM	Companion Data Services, LLC	OCR-IC-105	DocFinity Intelligent Capture OCR - 1.2M	\$51,856.09
518210ERM	Companion Data Services, LLC	OCR-IC-106	DocFinity Intelligent Capture OCR - 2M	\$80,087.24
518210ERM	Companion Data Services, LLC	OCR-IC-107	DocFinity Intelligent Capture OCR - 2.4M	\$84,711.33

*Figure 13. DocFinity SaaS Intelligent Capture Pricing*

### **DocFinity Enterprise (Full-Text) Search OCR for SaaS Deployment**

DocFinity Enterprise Search OCR extends DocFinity's search capabilities to the full-text content of documents. DocFinity Enterprise Search runs on its own server to maximize its indexing and search performance. Administrators specify which document types in the system should be full-text indexed, and those documents can be processed by the OCR server and indexed accordingly. Users can then search in the full text of documents, such as for a name or key word, and Enterprise Search returns all instances of the term, highlighted within the full text. The ability to locate structured and unstructured data contained in PDFs, TIFF files and other documents can streamline efficiency and improve processing turnaround. Full-text searching improves access to unindexed data and can therefore reduce the required indexing overhead. In addition, full-text searching dramatically improves your capacity to respond to e-discovery requests.

DocFinity Enterprise Search OCR feature is based on the number of servers dedicated per year, offering unlimited searches. The software component is installed on AWS servers which are managed and secured by CDS. Figure 14 details the DocFinity Enterprise Search for SaaS Deployment product and price information.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	OCR-ESS-UNL	DocFinity Enterprise Search OCR	\$5,303.64

*Figure 14. DocFinity SaaS Enterprise (Full-Text) Search Pricing*

### **DocFinity Barcode Recognition OCR for SaaS Deployment**

The purpose of using barcodes is to eliminate slow, error-prone, manual index data entry that populates the database. Printing documents with barcodes or using separator sheets with barcodes printed on them permits key information to be read from the barcode automatically and allows for ease of indexing and collection of information and minimizes data entry errors without limitation to file amount. With DocFinity, barcodes can be used as document identifiers to automatically separate one document from another and index documents appropriately. When DocFinity barcode capabilities are configured and invoked DocFinity can automatically read barcodes on documents when they are scanned for electronic storage. A barcode on the first of many document pages in a batch marks the first page of the group and indicates that the following pages all belong. DocFinity will then treat these pages as part of a document bundle until another barcode appears. This has proven to be a fast and accurate method of data entry, as key information in a barcode can be used to interact with documents for appropriate database indexing.

The DocFinity Barcode Recognition OCR feature is based on the number of pages processed per year, with no roll-over to the following year. The software component is installed on AWS servers, which are managed and secured by CDS. Figure 15 details the DocFinity Barcode Recognition OCR for SaaS Deployment product and price information.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	OCR-BR-101	DocFinity Barcode Recognition OCR - 50K	\$2,311.58
518210ERM	Companion Data Services, LLC	OCR-BR-102	DocFinity Barcode Recognition OCR - 100K	\$4,544.09
518210ERM	Companion Data Services, LLC	OCR-BR-103	DocFinity Barcode Recognition OCR - 200K	\$8,739.94
518210ERM	Companion Data Services, LLC	OCR-BR-104	DocFinity Barcode Recognition OCR - 400K	\$16,435.15
518210ERM	Companion Data Services, LLC	OCR-BR-105	DocFinity Barcode Recognition OCR - 800K	\$29,926.24
518210ERM	Companion Data Services, LLC	OCR-BR-106	DocFinity Barcode Recognition OCR - 1M	\$37,415.33

Figure 15. DocFinity SaaS OCR Barcode Recognition Pricing

### DocFinity Cloud Self Service Gateway for SaaS Deployment

This provides external user access to documents, electronic forms and searches from externally facing portals without the need of being registered users of DocFinity and consuming an official DocFinity Cloud Concurrent User. Pricing includes a fixed licensed fee per month, plus a dynamic user fee dependent on actual feature consumption by each named user per month. Actions are tracked for each named user and billed monthly based on the number of actions performed by those users. Tracked actions include the following: viewing a document, submitting a form, executing a search and starting a business process. An Active User is defined as a unique user performing 100 actions per month or less. A Power User is defined as a unique user performing more than 100 actions per month.

Figure 16 provides product and price information relative to the DocFinity Cloud Self Service Gateway.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DPUC-DSSG-101	Cloud Self Service Gateway Module License	\$188.24
518210ERM	Companion Data Services, LLC	DPUC-DSSG-102	Cloud Self Service Gateway Active User	\$1.50
518210ERM	Companion Data Services, LLC	DPUC-DSSG-103	Cloud Self Service Gateway Power User	\$4.71

*Figure 16. DocFinity Cloud Self Service Gateway Pricing*

Figure 17 details the Monthly Maintenance pricing for DocFinity Cloud Self Service Gateway. Maintenance will be billed monthly at the rates defined in the figure below.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DPUC-DSSG-M101	Cloud Self Service Gateway License Maintenance	\$56.47
518210ERM	Companion Data Services, LLC	DPUC-DSSG-M102	Cloud Self Service Gateway Active User Maintenance	\$0.45
518210ERM	Companion Data Services, LLC	DPUC-DSSG-M103	Cloud Self Service Gateway Power User Maintenance	\$1.41

*Figure17. DocFinity Cloud Self Service Gateway Maintenance Pricing*

**DocFinity Maintenance Services (Professional Services) – On-Premise and SaaS Deployment**

The rates detailed in Figure 18 apply to entities receiving Professional Services specific to DocFinity such as project planning, system design, creation and application consulting. As based on the DocFinity software application and use, installation, custom programming, software interfacing and integrating with third party or customer-owned software applications, business process analysis and consulting, risk assessment consulting, change management consulting, backup and disaster recovery consulting.

Professional Services are contracted as work-for-hire engagements that require agreed and signed Statements of Work.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DMSV-200-1	DocFinity Maintenance Services Hourly Rate	\$188.24
518210ERM	Companion Data Services, LLC	DMSV-200-2	DocFinity Maintenance Services Daily Rate	\$1,411.79

*Figure18. DocFinity Professional Services Pricing*

**DocFinity Training Courses - On-Premise and SaaS Deployment**

**DocFinity Core Training (DCPT-201-1)**

This training provides a high-level overview of the DocFinity software solution and covers core concepts that all other course content assumes as basic knowledge. End user tools and administrative overviews are covered in this class.

**DocFinity 101 (DCPT-201-1)**

Provides a high-level overview of the DocFinity software solution. Covering core concepts that all other course content assumes as basic knowledge. End user tools and administrative overviews are covered in this class.

**DocFinity Administration (DCPT-201-1)**

Hands-on out of the box security administration of groups and users to secure your organization's sensitive information. Document category and type classifications for document metadata structures. Establish scanning and indexing profiles. Import from file directories and email drop points.

**DocFinity System Design (DCPT-201-1)**

How to gather a document inventory and establish metadata and security needs for developing an indexing plan. Class steps students through a typical departmental discovery through design process with hands-on exercises using design documents to configure the system design.

**DocFinity BPM Core (DCPT-201-2)**

Class covers the three main BPM components: client, designer, and server. Course designed for anyone who will design and/or modify BPM designs.

**DocFinity BPM Concepts for Managers (DCPT-201-3)**

Overview class for managers to understand BPM core concepts and process integration to best be able to contribute to process consulting engagements.

**DocFinity COLD (DCPT-201-4)**

Hands-on configuration and management of computer report output and how to configure indexing and automate the capture stream process.

**DocFinity Application Programming Interface (API) (DCPT-201-5)**

Hands-on class that covers the DocFinity URL API and the web-services based DocFinity API.

**DocFinity eForms (DCPT-201-6)**

The DocFinity eForms module creates and processes electronic, web-based forms that work with the document management and business process management suite. The class will cover eForms administration and eForms designer functionality, with hands-on activities that illustrate how to create and design eForms.

**Records Management (DCPT-201-7)**

The DocFinity Records Management module is designed to help you comply with your own corporate record retention policies, government regulations and record retention and discovery for legal cases. Records Management automates complicated and intense company policies that are burdensome. By enforcing policies and regulations with the automated features, Records Management offers a necessary protection.

**Structured Query Language (SQL) 101 (DCPT-201-8)**

SQL 101 class is a one day training of SQL. This course provides non-database administrators everything they need to know about the basics of SQL. Basic Database Concepts, Relational Database, SQL Queries and Syntax are discussed in this course among other topics.

**DocFinity Dashboards (DCPT-201-9)**

The DocFinity Dashboard class is comprised of two days. The first day will concentrate on using SQL to gather your Key Performance Indicators (KPIs) and how to create datasources in DocFinity for them. The

second day will show how to use those datasources to create charts and dashboards for reporting purposes.

**DocFinity Intelligent Capture (DCPT-201-10)**

The setup, use and administration of DocFinity Intelligent Capture is covered in this three day course.

**DocFinity Enterprise Search (DCPT-201-11)**

The setup, use and administration of DocFinity Enterprise Search is covered in this one day course.

The rates for instructor-led DocFinity training courses are provided in Figure 19. For training programs that take place outside our corporate offices in Columbia, South Carolina, or State College, Pennsylvania, the instructor’s travel expenses, technological equipment (personal computers) and services (internet connection) as well as any venue-related expenses (rent, catering and others) will be provided or paid by the Government entity.

SIN	Manufacturer Name	MFR Part No.	Product Name	GSA Price
518210ERM	Companion Data Services, LLC	DCPT-201-1	DocFinity Core Training	\$7,058.96
518210ERM	Companion Data Services, LLC	DCPT-201-1	DocFinity 101	\$1,410.23
518210ERM	Companion Data Services, LLC	DCPT-201-1	DocFinity Administration	\$4,230.68
518210ERM	Companion Data Services, LLC	DCPT-201-1	DocFinity System Design	\$1,410.23
518210ERM	Companion Data Services, LLC	DCPT-201-2	DocFinity BPM Core Training	\$7,058.96
518210ERM	Companion Data Services, LLC	DCPT-201-3	DocFinity BPM Concepts for Managers	\$1,411.79
518210ERM	Companion Data Services, LLC	DCPT-201-4	DocFinity COLD Training	\$4,235.38
518210ERM	Companion Data Services, LLC	DCPT-201-5	DocFinity API Training	\$1,411.79
518210ERM	Companion Data Services, LLC	DCPT-201-6	DocFinity eForms Training	\$2,823.59
518210ERM	Companion Data Services, LLC	DCPT-201-7	Records Management	\$1,410.23
518210ERM	Companion Data Services, LLC	DCPT-201-8	SQL 101	\$1,410.23
518210ERM	Companion Data Services, LLC	DCPT-201-9	DocFinity Dashboards	\$2,820.45
518210ERM	Companion Data Services, LLC	DCPT-201-10	DocFinity Intelligent Capture	\$4,230.68
518210ERM	Companion Data Services, LLC	DCPT-201-11	DocFinity Enterprise Search	\$1,410.23

*Figure19. DocFinity Instructor-Led Training Courses*

# Companion Data Services Accessibility Conformance Report

## Revised Section 508 Edition

VPAT® Version 2.3 (Revised) – April 2019

**Name of Product/Version:** DocFinity

**Product Description:** DocFinity® is a high-powered, next generation Enterprise Content Management and Business Process Management suite. It is an all-inclusive solution for document, content, business process, eForms and records management.

**Report Date:** August 8, 2019

**Contact Information:** Charlton Goodwin, (p): 803-264-2312, (e):  
charlton.goodwin@companiondataservices.com

**Notes:** DocFinity is accessible only in its Workspaces and Gateway modules. DocFinity Desktop, Administration, Dashboards Designer, Dashboards, Process Designer and Form Designer are currently not tested or designed for accessibility. Reported conformance levels apply solely to the Workspaces and Gateway modules.

**Evaluation Methods Used:** Testing is based on general product knowledge.

**Applicable Standards/Guidelines**

This report covers the degree of conformance for the following accessibility standard/guidelines:

Standard/Guideline	Included In Report
<a href="#">Web Content Accessibility Guidelines 2.0</a>	Level A (Yes) Level AA (Yes) Level AAA (No)
<a href="#">Revised Section 508 standards published January 18, 2017 and corrected January 22, 2018</a>	(Yes)

### Terms

The terms used in the Conformance Level information are defined as follows:

- **Supports:** The functionality of the product has at least one method that meets the criterion without known defects or meets with equivalent facilitation.
- **Partially Supports:** Some functionality of the product does not meet the criterion.
- **Does Not Support:** The majority of product functionality does not meet the criterion.
- **Not Applicable:** The criterion is not relevant to the product.

- **Not Evaluated:** The product has not been evaluated against the criterion. This can be used only in WCAG 2.0 Level AAA.

### **WCAG 2.0 Report**

Tables 1 and 2 also document conformance with:

- Chapter 5 – 501.1 Scope, 504.2 Content Creation or Editing
- Chapter 6 – 602.3 Electronic Support Documentation

Note: When reporting on conformance with the WCAG 2.0 Success Criteria, they are scoped for full pages, complete processes, and accessibility-supported ways of using technology as documented in the [WCAG 2.0 Conformance Requirements](#).

Table 1: Success Criteria, Level A  
Notes:

Criteria	Conformance Level	Remarks and Explanations
<p><b><u>1.1.1 Non-text Content</u></b> (Level A) Also applies to: Revised Section 508</p> <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	<p>Web: Partially Supports Electronic Docs: Does not Support Software: Supports Authoring Tool: Supports</p>	<p>Web: DocFinity’s built-in document viewer does not provide text alternatives. Electronic Docs: Screenshots are not annotated with text. Software: No additional remarks Authoring Tool: No additional remarks</p>
<p><b><u>1.2.1 Audio-only and Video-only (Prerecorded)</u></b> (Level A) Also applies to: Revised Section 508</p> <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	<p>Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports</p>	<p>Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks</p>
<p><b><u>1.2.2 Captions (Prerecorded)</u></b> (Level A) Also applies to: Revised Section 508</p> <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	<p>Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports</p>	<p>Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks</p>
<p><b><u>1.2.3 Audio Description or Media Alternative (Prerecorded)</u></b> (Level A) Also applies to: Revised Section 508</p> <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	<p>Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports</p>	<p>Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks</p>
<p><b><u>1.3.1 Info and Relationships</u></b> (Level A) Also applies to: Revised Section 508</p> <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	<p>Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports</p>	<p>Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks</p>
<p><b><u>1.3.2 Meaningful Sequence</u></b> (Level A) Also applies to: Revised Section 508</p> <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	<p>Web: N/A Electronic Docs: N/A Software: N/A Authoring Tool: N/A</p>	<p>Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks</p>
<p><b><u>1.3.3 Sensory Characteristics</u></b> (Level A)</p>	<p>Web: Supports</p>	<p>Web: No additional remarks</p>

Criteria	Conformance Level	Remarks and Explanations
Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>1.4.1 Use of Color</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>1.4.2 Audio Control</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>2.1.1 Keyboard</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>2.1.2 No Keyboard Trap</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>2.2.1 Timing Adjustable</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>2.2.2 Pause, Stop, Hide</u></b> (Level A) Also applies to: <ul style="list-style-type: none"> <li>•</li> </ul> Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>2.3.1 Three Flashes or Below Threshold</u></b> (Level A)	Web: Supports	Web: No additional remarks

Criteria	Conformance Level	Remarks and Explanations
Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>2.4.1 Bypass Blocks</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software) – Does not apply to non-web software</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs) – Does not apply to non-web docs</li> </ul>	Web: Supports Electronic Docs: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Authoring Tool: No additional remarks
<b><u>2.4.2 Page Titled</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>2.4.3 Focus Order</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>2.4.4 Link Purpose (In Context)</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>3.1.1 Language of Page</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>3.2.1 On Focus</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks

Criteria	Conformance Level	Remarks and Explanations
<b><u>3.2.2 On Input</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>501 (Web)(Software)</li> <li>504.2 (Authoring Tool)</li> <li>602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>3.3.1 Error Identification</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>501 (Web)(Software)</li> <li>504.2 (Authoring Tool)</li> <li>602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>3.3.2 Labels or Instructions</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>501 (Web)(Software)</li> <li>504.2 (Authoring Tool)</li> <li>602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>4.1.1 Parsing</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>501 (Web)(Software)</li> <li>504.2 (Authoring Tool)</li> <li>602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>4.1.2 Name, Role, Value</u></b> (Level A) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>501 (Web)(Software)</li> <li>504.2 (Authoring Tool)</li> <li>602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks

Table 2: Success Criteria, Level AA

Notes:

Criteria	Conformance Level	Remarks and Explanations
<b><u>1.2.4 Captions (Live)</u></b> (Level AA) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>501 (Web)(Software)</li> <li>504.2 (Authoring Tool)</li> <li>602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>1.2.5 Audio Description (Prerecorded)</u></b> (Level AA)	Web: Supports	Web: No additional remarks

Criteria	Conformance Level	Remarks and Explanations
Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>1.4.3 Contrast (Minimum)</u></b> (Level AA) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>1.4.4 Resize text</u></b> (Level AA) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>1.4.5 Images of Text</u></b> (Level AA) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>2.4.5 Multiple Ways</u></b> (Level AA) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software) – Does not apply to non-web software</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs) – Does not apply to non-web docs</li> </ul>	Web: Supports Electronic Docs: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Authoring Tool: No additional remarks
<b><u>2.4.6 Headings and Labels</u></b> (Level AA) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks
<b><u>2.4.7 Focus Visible</u></b> (Level AA) Also applies to: Revised Section 508 <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports	Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks

Criteria	Conformance Level	Remarks and Explanations
<p><b>3.1.2 Language of Parts</b> (Level AA)</p> <p>Also applies to: Revised Section 508</p> <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	<p>Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports</p>	<p>Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks</p>
<p><b>3.2.3 Consistent Navigation</b> (Level AA)</p> <p>Also applies to: Revised Section 508</p> <ul style="list-style-type: none"> <li>• 501 (Web)(Software) – Does not apply to non-web software</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs) – Does not apply to non-web docs</li> </ul>	<p>Web: Supports Electronic Docs: Supports Authoring Tool: Supports</p>	<p>Web: No additional remarks Electronic Docs: No additional remarks Authoring Tool: No additional remarks</p>
<p><b>3.2.4 Consistent Identification</b> (Level AA)</p> <p>Also applies to: Revised Section 508</p> <ul style="list-style-type: none"> <li>• 501 (Web)(Software) – Does not apply to non-web software</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs) – Does not apply to non-web docs</li> </ul>	<p>Web: Supports Electronic Docs: Supports Authoring Tool: Supports</p>	<p>Web: No additional remarks Electronic Docs: No additional remarks Authoring Tool: No additional remarks</p>
<p><b>3.3.3 Error Suggestion</b> (Level AA)</p> <p>Also applies to: Revised Section 508</p> <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	<p>Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports</p>	<p>Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks</p>
<p><b>3.3.4 Error Prevention (Legal, Financial, Data)</b> (Level AA)</p> <p>Also applies to: Revised Section 508</p> <ul style="list-style-type: none"> <li>• 501 (Web)(Software)</li> <li>• 504.2 (Authoring Tool)</li> <li>• 602.3 (Support Docs)</li> </ul>	<p>Web: Supports Electronic Docs: Supports Software: Supports Authoring Tool: Supports</p>	<p>Web: No additional remarks Electronic Docs: No additional remarks Software: No additional remarks Authoring Tool: No additional remarks</p>

## Revised Section 508 Report

Notes:

### Chapter 3: [Functional Performance Criteria](#) (FPC)

Notes:

Criteria	Conformance Level	Remarks and Explanations
302.1 Without Vision	Partially Supports	Built-in document viewer does not support screen readers. DocFinity provides a download option to bypass the built-in document viewer.
302.2 With Limited Vision	Supports	No additional remarks
302.3 Without Perception of Color	Supports	No additional remarks
302.4 Without Hearing	Supports	No additional remarks
302.5 With Limited Hearing	Supports	No additional remarks
302.6 Without Speech	Supports	No additional remarks
302.7 With Limited Manipulation	Supports	No additional remarks
302.8 With Limited Reach and Strength	Supports	No additional remarks
302.9 With Limited Language, Cognitive, and Learning Abilities	Supports	No additional remarks

### Chapter 4: [Hardware](#)

Notes: DocFinity does not include any hardware components.

Criteria	Conformance Level	Remarks and Explanations
<b><a href="#">402 Closed Functionality</a></b>	Heading cell – no response required	Heading cell – no response required
<b>402.1 General</b>	Heading cell – no response required	Heading cell – no response required
<b>402.2 Speech-Output Enabled</b>	Heading cell – no response required	Heading cell – no response required
402.2.1 Information Displayed On-Screen	Not Applicable	No additional remarks
402.2.2 Transactional Outputs	Not Applicable	No additional remarks
402.2.3 Speech Delivery Type and Coordination	Not Applicable	No additional remarks
402.2.4 User Control	Not Applicable	No additional remarks
402.2.5 Braille Instructions	Not Applicable	No additional remarks
<b>402.3 Volume</b>	Heading cell – no response required	Heading cell – no response required
402.3.1 Private Listening	Not Applicable	No additional remarks
402.3.2 Non-private Listening	Not Applicable	No additional remarks

Criteria	Conformance Level	Remarks and Explanations
402.4 Characters on Display Screens	Not Applicable	No additional remarks
402.5 Characters on Variable Message Signs	Not Applicable	No additional remarks
<b><u>403 Biometrics</u></b>	Heading cell – no response required	Heading cell – no response required
403.1 General	Not Applicable	No additional remarks
<b><u>404 Preservation of Information Provided for Accessibility</u></b>	Heading cell – no response required	Heading cell – no response required
404.1 General	Not Applicable	No additional remarks
<b><u>405 Privacy</u></b>	Heading cell – no response required	Heading cell – no response required
405.1 General	Not Applicable	No additional remarks
<b><u>406 Standard Connections</u></b>	Heading cell – no response required	Heading cell – no response required
406.1 General	Not Applicable	No additional remarks
<b><u>407 Operable Parts</u></b>	Heading cell – no response required	Heading cell – no response required
407.2 Contrast	Not Applicable	No additional remarks
<b><u>407.3 Input Controls</u></b>	Heading cell – no response required	Heading cell – no response required
407.3.1 Tactilely Discernible	Not Applicable	No additional remarks
407.3.2 Alphabetic Keys	Not Applicable	No additional remarks
407.3.3 Numeric Keys	Not Applicable	No additional remarks
407.4 Key Repeat	Not Applicable	No additional remarks
407.5 Timed Response	Not Applicable	No additional remarks
407.6 Operation	Not Applicable	No additional remarks
407.7 Tickets, Fare Cards, and Keycards	Not Applicable	No additional remarks
<b><u>407.8 Reach Height and Depth</u></b>	Heading cell – no response required	Heading cell – no response required
407.8.1 Vertical Reference Plane	Not Applicable	No additional remarks
407.8.1.1 Vertical Plane for Side Reach	Not Applicable	No additional remarks
407.8.1.2 Vertical Plane for Forward Reach	Not Applicable	No additional remarks
407.8.2 Side Reach	Not Applicable	No additional remarks
407.8.2.1 Unobstructed Side Reach	Not Applicable	No additional remarks
407.8.2.2 Obstructed Side Reach	Not Applicable	No additional remarks
407.8.3 Forward Reach	Not Applicable	No additional remarks
407.8.3.1 Unobstructed Forward Reach	Not Applicable	No additional remarks
407.8.3.2 Obstructed Forward Reach	Not Applicable	No additional remarks
407.8.3.2.1 Operable Part Height for ICT with Obstructed Forward Reach	Not Applicable	No additional remarks
407.8.3.2.2 Knee and Toe Space under ICT with Obstructed Forward Reach	Not Applicable	No additional remarks

<b>Criteria</b>	<b>Conformance Level</b>	<b>Remarks and Explanations</b>
<b><u>408 Display Screens</u></b>	Heading cell – no response required	Heading cell – no response required
408.2 Visibility	Not Applicable	No additional remarks
408.3 Flashing	Not Applicable	No additional remarks
<b><u>409 Status Indicators</u></b>	Heading cell – no response required	Heading cell – no response required
409.1 General	Not Applicable	No additional remarks
<b><u>410 Color Coding</u></b>	Heading cell – no response required	Heading cell – no response required
410.1 General	Not Applicable	No additional remarks
<b><u>411 Audible Signals</u></b>	Heading cell – no response required	Heading cell – no response required
411.1 General	Not Applicable	No additional remarks
<b><u>412 ICT with Two-Way Voice Communication</u></b>	Heading cell – no response required	Heading cell – no response required
<b><i>412.2 Volume Gain</i></b>	Heading cell – no response required	Heading cell – no response required
412.2.1 Volume Gain for Wireline Telephones	Not Applicable	No additional remarks
412.2.2 Volume Gain for Non-Wireline ICT	Not Applicable	No additional remarks
<b><i>412.3 Interference Reduction and Magnetic Coupling</i></b>	Heading cell – no response required	Heading cell – no response required
412.3.1 Wireless Handsets	Not Applicable	No additional remarks
412.3.2 Wireline Handsets	Not Applicable	No additional remarks
412.4 Digital Encoding of Speech	Not Applicable	No additional remarks
412.5 Real-Time Text Functionality	Reserved for future	Reserved for future
412.6 Caller ID	Not Applicable	No additional remarks
412.7 Video Communication	Not Applicable	No additional remarks
<b><i>412.8 Legacy TTY Support</i></b>	Heading cell – no response required	Heading cell – no response required
412.8.1 TTY Connectability	Not Applicable	No additional remarks
412.8.2 Voice and Hearing Carry Over	Not Applicable	No additional remarks
412.8.3 Signal Compatibility	Not Applicable	No additional remarks
412.8.4 Voice Mail and Other Messaging Systems	Not Applicable	No additional remarks
<b><u>413 Closed Caption Processing Technologies</u></b>	Heading cell – no response required	Heading cell – no response required
413.1.1 Decoding and Display of Closed Captions	Not Applicable	No additional remarks
413.1.2 Pass-Through of Closed Caption Data	Not Applicable	No additional remarks
<b><u>414 Audio Description Processing Technologies</u></b>	Heading cell – no response required	Heading cell – no response required
414.1.1 Digital Television Tuners	Not Applicable	No additional remarks

Criteria	Conformance Level	Remarks and Explanations
414.1.2 Other ICT	Not Applicable	No additional remarks
<b><u><a href="#">415 User Controls for Captions and Audio Descriptions</a></u></b>	Heading cell – no response required	Heading cell – no response required
415.1.1 Caption Controls	Not Applicable	No additional remarks
415.1.2 Audio Description Controls	Not Applicable	No additional remarks

Chapter 5: [Software](#)

Notes: DocFinity Workspaces and Gateway modules are web applications. They are covered by the WCAG 2.0 Section.

Criteria	Conformance Level	Remarks and Explanations
<b>501.1 Scope – Incorporation of WCAG 2.0 AA</b>	See <a href="#">WCAG 2.0</a> section	See information in WCAG 2.0 section
<b><u><a href="#">502 Interoperability with Assistive Technology</a></u></b>	Heading cell – no response required	Heading cell – no response required
502.2.1 User Control of Accessibility Features	Not Applicable	No additional remarks
502.2.2 No Disruption of Accessibility Features	Not Applicable	No additional remarks
<b><u><a href="#">502.3 Accessibility Services</a></u></b>	Heading cell – no response required	Heading cell – no response required
502.3.1 Object Information	Not Applicable	No additional remarks
502.3.2 Modification of Object Information	Not Applicable	No additional remarks
502.3.3 Row, Column, and Headers	Not Applicable	No additional remarks
502.3.4 Values	Not Applicable	No additional remarks
502.3.5 Modification of Values	Not Applicable	No additional remarks
502.3.6 Label Relationships	Not Applicable	No additional remarks
502.3.7 Hierarchical Relationships	Not Applicable	No additional remarks
502.3.8 Text	Not Applicable	No additional remarks
502.3.9 Modification of Text	Not Applicable	No additional remarks
502.3.10 List of Actions	Not Applicable	No additional remarks
502.3.11 Actions on Objects	Not Applicable	No additional remarks
502.3.12 Focus Cursor	Not Applicable	No additional remarks
502.3.13 Modification of Focus Cursor	Not Applicable	No additional remarks
502.3.14 Event Notification	Not Applicable	No additional remarks
502.4 Platform Accessibility Features	Not Applicable	No additional remarks
<b><u><a href="#">503 Applications</a></u></b>	Heading cell – no response required	Heading cell – no response required
503.2 User Preferences	Not Applicable	No additional remarks
503.3 Alternative User Interfaces	Not Applicable	No additional remarks
<b><u><a href="#">503.4 User Controls for Captions and Audio Description</a></u></b>	Heading cell – no response required	Heading cell – no response required

Criteria	Conformance Level	Remarks and Explanations
503.4.1 Caption Controls	Not Applicable	No additional remarks
503.4.2 Audio Description Controls	Not Applicable	No additional remarks
<b><u>504 Authoring Tools</u></b>	Heading cell – no response required	Heading cell – no response required
504.2 Content Creation or Editing (if not authoring tool, enter “not applicable”)	See <a href="#">WCAG 2.0</a> section	See information in WCAG 2.0 section
504.2.1 Preservation of Information Provided for Accessibility in Format Conversion	Does Not Support	No additional remarks
504.2.2 PDF Export	Not Applicable	No additional remarks
504.3 Prompts	Does Not Support	No additional remarks
504.4 Templates	Not Applicable	No additional remarks

Chapter 6: [Support Documentation and Services](#)

Notes:

Criteria	Conformance Level	Remarks and Explanations
<b><i>601.1 Scope</i></b>	Heading cell – no response required	Heading cell – no response required
<b><u>602 Support Documentation</u></b>	Heading cell – no response required	Heading cell – no response required
602.2 Accessibility and Compatibility Features	Supports	No additional remarks
602.3 Electronic Support Documentation	See <a href="#">WCAG 2.0</a> section	See information in WCAG 2.0 section
602.4 Alternate Formats for Non-Electronic Support Documentation	Not Applicable	No additional remarks
<b><u>603 Support Services</u></b>	Heading cell – no response required	Heading cell – no response required
603.2 Information on Accessibility and Compatibility Features	Supports	No additional remarks
603.3 Accommodation of Communication Needs	Supports	No additional remarks