REQUEST FOR PROPOSALS NO. PS20190221

PROVISION OF A LITIGATION SUPPORT SYSTEM

<u>QUESTIONS AND ANSWERS NO. 4</u>

ISSUED ON MARCH 20, 2019

Q1	Would the City consider a Managed Services solution, or is the solution being sought completely in-house?
A1	We would consider solutions hosted on-premise at the City's datacenter (Technical Requirement T-18), or hosted in a Cloud Environment (Technical Requirement T-19). It is a Mandatory Requirement that if deployed to a Cloud environment, the application and all of its components (e.g. data, etc.) must be deployed to a Canadian location and guaranteed Canadian data sovereignty (Technical Requirement T-20).
Q2	In the OCR requirements, proponents are to "Provide Information" for AI. Would the City be interested in items such as Email Threading, Near Duplicate Detection, Clustering, Concept Searching, Categorization, or TAR?
A2	Yes. Please clearly state which of these items are supported with your solution and provide further information for each of the supported items.
Q3	If the City is looking for an in-house solution, what is preferred: desktop-based; or web-based?
A3	The City has no preference.
Q4	Is the City looking for a processing tool that would be able to deduplicate and DENIST data?
A4	It is a preferred requirement (Business Requirement - MD 15) that a user should be able to identify duplicate, or near duplicate documents collected in a case library, so that the user can identify and review redundant vs. new information contained within those documents.
Q5	Please provide further clarification on the "Classification Structure" section: how is this related to creating folders in the system?
A5	As per business requirement MD 12, the City requires that a user be able to classify imported documents and manage them into different groups relevant for the case at hand, so that the user can organize the documents efficiently and find them more easily for later use. This Classification Structure can present as a Virtual Folder Structure to help organize the imported documents. Virtual Folder would be an auto-organizing container for documents that correspond to

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	specific attributes (or fields) and attribute (or field) values. A library can contain one or more Virtual Folders. For example, a library may have one Virtual Folder to organize data by case name, and another Virtual Folder to organize that data by document category. It is a preferred requirement that the solution support multi-level classification structure (e.g. each Virtual Folder can have an unlimited number of (Virtual) Subfolders). Documents would typically display in a Virtual Folder and Subfolder based on the coded attributes' (or fields') information for the document, therefore making it possible for a document to display in multiple Virtual Folders and Subfolders.
Q6	Please clarify: • MD 11.3 • MD 12.3 • LIT 21 • LIT 21.1 • LIT 24.2 • LIT 32.6 (specifically: 'map pleadings to multiple types') • PRD 33.9

A6	• MD11.3
	Provide information on whether there are attributes (or fields) that are auto-assigned and protected from changing for all users, no matter what security groups they belong to.
	
	• MD 12.3
	Provide information on whether your solution supports custom defined classification schema, to allow a user to create different classification categories and classify documents accordingly. For example: a user prefers to classify documents by Custodian Name; then for each Custodian the user wants to know which of the documents are Privileged vs. Not Privileged.
	
	• **LIT 21 and LIT 21.1**
	Provide information on whether your solution allows for:
	    o Creating and managing annotations to sections of the transcript;
	    o Importing and linking to exhibits for a transcript;
	    o Creating and managing transcript summaries; and
	    o Creating and managing designation types, and applying designation to a transcript.
	
	• **LIT 24.2**
	Provide information on whether your solution would allow for adding a reference (e.g. link, x-reference, or cross-reference) to imported exhibits.
	
	• **LIT 32.6**
	"and map pleadings to multiple types" is a typo, and should be removed. Amendment No. 1 ("AMD1") will be posted to address this.
	
	• **PRD 33.9**
	It is a preferred requirement that the exported file is compatible with the leading LSS products on the market, so that when the City shares the exported file with other legal parties, they can easily import the documents with accompanying information into their own LSS solution.