

JUDICIAL COUNCIL OF CALIFORNIA
QUESTIONS AND ANSWERS
LSO-2019-012-CD-RFP- Legal Case and Project Management System
March 1, 2019

1. Would you kindly provide the following information or associated attachments as applicable?

- a) Pricing spreadsheet;
- b) Insurance requirements, including contractor insurance requirements if applicable;
- c) Information on indemnification;
- d) Information on liability, and;
- e) Information on your warrantee requirement(s).

ANSWER: We don't have a pricing spreadsheet. Please refer to Section 7.2, Cost Portion in the RFP. For items b-e, please refer to Attachment 2, Standard Agreement.

2. Our product is a licensed model based on the number of named users, how many users will need access to the system?

ANSWER:

The Judicial Council prefers that the pricing model is not based on number of named users and that an unlimited number of users can access and use the product. The total number of anticipated users is likely to be initially 50 to 100 and may change over time. If pricing model is based on named users or a specific number of licenses, please provide formula for costs based on increased ranges of user numbers/licenses.

3. Are the Service level requirements section of the requirements geared to a vendor hosted solution?

ANSWER: Yes

4. Whether companies from Outside USA can apply for this?
(like from India or Canada)

ANSWER: No

5. Whether we need to come over there for meetings?

ANSWER: Yes, the RFP process includes a demonstration of the product.

6. Can we perform the tasks (related to RFP) outside USA?
(like, from India or Canada)

ANSWER: No, the proposed agreement for this RFP (Attachment 2, page C-2) has the following provision:

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“No Work shall be provided from outside the continental United States. Remote access to JBE Data from outside the continental United States is prohibited unless approved in writing in advance by the JBE. The physical location of Contractor’s data center, systems, and equipment where the JBE Data is stored shall be within the continental United States.”

7. Can we submit the proposals via email?

ANSWER: No. Please refer to Section 6.0, Submission of Proposals of the RFP document.

8. What is the budget for this project?

ANSWER: The budget will depend on the solution offered.

- Does the budget include implementation?
-

ANSWER: Please include costs of implementation in proposed pricing. See Section 7.2(b)

- How many years of licenses are included in the budget?

ANSWER: One year

9. What is the approximate number of people that will be fulfilling the “cases”?

ANSWER: See answer to No. 2 above.

10. How many people will be staffing projects that will need to enter comments/updates?

ANSWER: See answer to number two above.

11. How many people will be managing those projects?

ANSWER: See answer to No. 2 above.

12. Can offshore resources be used for the implementation?

ANSWER: No. Please see answer to No. 6.

13. How many total concurrent users will be using the software?

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ANSWER: See answer to number two above.

14. Is there an existing case management system? If so, what are the primary reasons for wishing to replace it?

ANSWER: Yes, we are looking for a tool that allows for greater efficiencies and effectiveness in the areas described in the RFP.

15. Have you evaluated or viewed any other vendor's case management software products? If yes, please provide details.

ANSWER: No formal evaluations have been conducted.

16. Have you evaluated or viewed any other vendor's document management products? If yes, please provide details.

ANSWER: No formal evaluations have been conducted.

17. Will preference be given to browser-based applications?

ANSWER: No. Preference will be given to solutions that meet the criteria in the RFP.

18. Are solutions that utilize VDI technology (Citrix, RDP, VMware View) acceptable?

ANSWER: A VDI solution is not ideal. However, the answer may depend on the solution and whether JCC is required to provide VDI infrastructure.

19. Will any users be accessing the system via VPN? If yes, please provide technical requirements.

ANSWER: Depends on the solution. If this solution is only deployed for on premise access, then a VPN would most likely be needed. We use Cisco AnyConnect for our VPN access point. It must use a secondary factor authentication to establish a connection.

If this is a thick client implementation, we would need to know the port numbers and security protocols being used. If a proprietary encryption method is used, it needs to comply with our security encryption level of 128-bit AES minimum, 256-bit preferred

20. If planning on migrating data to the new system how many databases will need to be converted? For pricing purposes provide database schema, record layouts, etc. for

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each.

ANSWER: 1 database to start (will need to know which other departments want to use the CMS and what they're working with database-wise).

21. Is the desired timeframe for implementation (6/15/19) firm?

ANSWER: To be provided later.

22. Will any consultant be assisting with product selection or implementation? If a consultant is involved, please identify them. If assisting with the implementation, what systems have they had experienced with in the past?

ANSWER: No consultants will be assisting with product selection or implementation.

23. In the Business and Technical Requirements Response Form item MI-003 indicates "The solution shall provide a link to financial system's transaction records (e.g. SAP, FISCAL, Oracle Financial, etc.)" What are the functional and technical requirements for each integration?

ANSWER:

This cannot be answered without further clarification about the product/service offered by the Responder.

24. Page 4 of the RFP states "Integration of case and project management, e-Billing and performance analytics." What are the project management, e-Billing and performance analytics requirements?

ANSWER: The Judicial Council of California will consider different types of integration of case and project management, e-billing and performance as described by proposers. Please submit your proposals.

25. What version of Exchange/Outlook is used for email and calendaring?

ANSWER: The Judicial Council uses Office 365 for Outlook and exchange.

26. What other systems will be integrated into the new case management system? For each provide functional and technical requirements.

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ANSWER: see above #24 for other applications. For security, the system should have the ability to integrate with MS Active Directory or MS Office 365 AD for SSO. Integration and application compatibility with MS Office 365 Suite of application. Other potential systems would be integration with MS SharePoint for document collaboration.

27. What is being used for file room/records management to track physical paper-based files? Is the desire to replace or integrate with it?

ANSWER: Requester would like to replace physical paper-based files with digital records management to the greatest extent possible. Provide information on whether this capability exists within application or list of applications and systems that have existing integration partnerships.

28. How many total numbers of internal users that will use the system?

ANSWER: See number 2 above.

29. What is the total amount of storage needed?

ANSWER: The total amount of storage varies depending on the services/system offered by the Proposer. The Proposer should include storage capabilities in its proposal.

30. Are there any integrations to external systems required?

- o If so, please name which systems

ANSWER: No. However, the proposed solution should be accessible by external third parties for legal case updates, uploading documents, budgeting, e- billing and other services that increase efficiencies and effectiveness.

Please provide a list of integration capabilities and options which would be helpful for supporting integration if the need arises. Integration via APIs is preferable.

31. Would you be willing to extend the due date?

ANSWER: No

32. In light of Section 11B of Attachment 1, Administrative Rules governing RFPs, will the Judicial Council entertain a future contract based on Proposer's form with

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mutually agreed redlines? It is Proposer's policy to utilize our standard form, with applicable changes.

ANSWER: The JCC's strong preference is to use its model terms and conditions as shown on Attachment 2 of the RFP, which are based on statutory requirements under the Public Contract Code, Administrative Manual. Certain topics such as unique product licensing terms may be negotiated and mutually agreed upon by the JCC and the vendor. Other topics may not be materially negotiable. To the extent that a Proposer would like to propose additional contract provisions, a Proposer may submit proposed additions, deletions, and modifications to the Judicial Council's Terms and Conditions (Attachment 2) by submitting a red-lined version of Attachment 2 in MS Word format. Please see Section 7.1(i) of the RFP for further information and requirements. The extent to which a Proposer accepts the Judicial Council's Terms and Conditions is one of the RFP evaluation criteria.

33. Will the Judicial Counsel waive the requirement for Attachment 3, Proposer's Acceptance of Terms and Conditions based on the answer to the previous question?

ANSWER: No, not in advance of reviewing a vendor's proposal and bid.

34. BR-008 references MS Office Suite. Which version of Office are you using? Which version of Outlook and SharePoint, assuming use of those?

ANSWER: MS Office 365

35. What is your good faith estimate of JC of CA's annual legal spend?

ANSWER: Approximately \$4.5M to 6M per year.

36. How many client/company users will be using your new e-billing/matter management solution ("system")? See number 39 below.

Please see total numbers described above for company users potentially using new e-billing matters solution. External third-party user numbers vary depending on litigation handled at any given time.

37. How many legal department locations do you have?

- a. Within the United States: **Two**
- b. Outside of the United States (please list countries): **None**

38. Which company departments are planning on using the system right from the start (list all that apply: *e.g.* General Legal, Litigation, Intellectual Property, Claims, Risk Management, Human Resources, Accounting/Tax, Transactions/M&A, any others)?

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ANSWER: Legal services initially.

39. Total number of law firms and vendors currently used? Shelley – can you please help me with this?

- a. Within the United States: **41**
- b. Outside of the United States: **None**

40. How often do you receive invoices in international currencies? (*e.g.* frequently, occasionally, or never)

ANSWER: Never

41. Are you currently tracking international taxes and/or VAT compliance?

ANSWER: No

42. How much onsite assistance and training would you like?

ANSWER: A sufficient amount of ongoing on-site assistance and training to ensure a smooth transition.

43. What is the planned duration of your implementation (*i.e.* when are you hoping to “go live”)?

ANSWER: As soon as possible after execution of the contract; preferably within 30 to 90 days following execution of the contract.

44. Which of the following system features would you like to implement right from the start: **The Judicial Council would like to implement as many of the following system features as possible right from the start. The Proposer should propose an implementation plan in accordance with the RFP.**

- a. E-Billing
- b. Matter Management
- c. Budgeting
- d. Accruals
- e. Service of Process
- f. Timekeeper Rate Review
- g. LEDES Task Code Alerts
- h. Internal Timekeeping

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45. Total number of matters to create in the system for go-live: **The Requester will prepare the information in time for implementation. In the meantime, the Proposer should please provide a proposal that includes pricing and timing based on a range of open/active, closed/inactive and other matters.**

Open/active matters:

- a. Closed/inactive matters: **6600 matters approximately**
- b. Other matters: **400-500 active matters approximately**

46. How do you hope your matters are going to be created in the system? (manual creation within the system, use of system's Matter Upload tool, Data Conversion, or a combination of these)

ANSWER: The Judicial Council is willing to consider various approaches to matter creation and is interested in those that increase effectiveness and efficiency as described in the RFP.

47. How many other systems are being migrated to and/or connected with the e-billing/matter management system? **No other systems are being migrated to the proposed new system. Integration with other systems may be necessary for effective and efficient use. Proposer should include recommendations for system integrations that increase effectiveness and efficiency.**

- a. Data Conversion:
- b. AP Integration(s):
- c. Other integration(s):

48. Who is going to be responsible for scoping and completing the migration/integration projects? **Proposer will be responsible for scoping and completing the implementation project with support from Judicial Council staff.**

- a. Data Conversion (*i.e.* system's support staff, your team, or custom/blend):
- b. AP Integration(s) (*i.e.* system's support staff, your team, or custom/blend):
- c. Other integration(s) (*i.e.* system's support staff, your team, or custom/blend):

49. Regarding Data Conversion Pricing – We recommend that – eventually – you provide a copy of your database to accurately scope your Data Conversion project. In the absence of a database copy, we will rely on your answers to the questions below to scope and price the Data Conversion. If the actual data provided during Implementation is significantly different from your responses to the following, a change order may be needed for any services above and beyond the scope set by your answers below.

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The Proposer should please provide a proposal that includes pricing and timing based on a range of variables considering the requested information below.

- a. What system is your matter data in now? (If multiple systems, please name all.)
MS Access
- b. Do you have the ability to get all of your data out of that system? **Yes**
 - a. Would you have the ability to get the data out of that system multiple times? **Yes**
 - b. If you do, what format will the data be in? (SQL, Oracle, Access, Excel, .csv, etc.) **Access, Excel, .csv**
- c. Total number of matters to convert? **See answer to question 45**
 - c. How many of these are open/active?
 - d. How many are closed/inactive?
- d. Total number of invoices to convert? **None**
- e. Total number of documents to convert? **None**
- f. Total number of calendar dates/events to convert? **None**
- g. Total number of status reports/notes to convert? **None**

50. Regarding AP Integration Pricing

As described more fully in the RFP, the Requester seeks a solution that includes e-billing that allows uploading, review, rejection and internal transfer (among other things) of invoices from external vendors. Based on this information, the Proposer should submit a proposal that provides pricing and timing accordingly. The Requester does not plan to use the solution for payment purposes. Please see the RFP for further information.

- a. Please provide the name(s) and version(s) of each AP system you want integrated.
- b. For each AP system identified above, please provide an example of each system's Invoice Import data file and any file specifications.
- c. For each AP system identified above, how many different AP Routes will be included in each integration? *Note: AP Routes are configured in the system and determine how often approved invoices are batched and sent, who the batch is sent to, how the batch is delivered (SFTP, web services, email, or manual download from the system), and what forms of invoice documents will accompany the batch (invoice spreadsheets, invoice summaries, the invoices themselves, and/or supporting documents).*

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- d. In addition to approved invoice information in a data file format, please specify whether you want the invoice information delivered to the SFTP in another format such as:
- a. Copies of attached invoices and supporting documents
 - b. A zip file of invoice summary documents (HTML or PDF format)
 - c. Individual invoice summary documents (HTML or PDF format)
- e. If you want to reverse feed payment information back into approved invoices in the system, after AP processes approved invoice batches, please specify whether you can provide the standard file format described in the attached Reverse Feed Specifications file.
- f. If you cannot provide a file formatted per the Reverse Feed Specifications, please provide an example of a file you can provide and any file specifications. (If applicable, please provide for each AP system identified above.)
- g. What is your target completion date for this AP Integration project?

END OF QUESTIONS AND ANSWERS