



**State of Oklahoma
Office of Management and
Enterprise Services
Information Services Division**

Amendment of Solicitation

Date of Issuance: 5/20/2014 Solicitation No. 0900000138
 Requisition No. _____ Amendment No. 1

Hours and date specified for receipt of offers is changed: No Yes, to: _____ CST/CDT

Pursuant to OAC 580:15-4-5©, this document shall serve as official notice of amendment to the Solicitation identified above. Such notice is being provided to all suppliers to which the original solicitation was sent. Suppliers submitting bids or quotations shall acknowledge receipt of this solicitation amendment prior to the hour and date specified in the solicitation as follows:

- (1) Sign and return a copy of this amendment with the solicitation response being submitted; or,
- (2) If the supplier has already submitted a response, this acknowledgement must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date printed clearly on the front of the envelope.

ISSUED BY AND RETURN TO:

Office of Management and Enterprise Services
 ISD Procurement Attn: Sheri Keller
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Description of Amendment:

a. This is to incorporate the following:

Per Section E.10 General Solicitation Questions. The questions period closed May 14, 2014. This amendment captures all questions and answers asked before the deadline.

This amendment will need to be signed and returned with your proposal package on the close date, 3 p.m. CST May 23, 2014.

Page comment added by Victoria Tsai

Clarification Questions:

73. Provide for private and public folders, tags, and document numbering, including the ability to cross-reference internal working numbers with bates numbers applied to publicly-produced records

Where are the internal working numbers located? Please provide an example of this cross-reference process.

OMES Answer: The internal working numbers would be generated during the processing and review phase by the solution to track the ESI; the end product would be bates numbered as responsive to a request for production or an open records request or withheld and entered into a privilege log. The solution would cross-reference the internal working number with the final bates numbering.

b. All other terms and conditions remain unchanged.

Supplier Company Name (**PRINT**) _____ Date _____

Authorized Representative Name (**PRINT**) _____ Title _____ Authorized Representative Signature _____



Example: 5,000 pages of custodian documents are ingested by the system and internal working numbers are assigned for review purposes. After two weeks of review by multiple reviewers, some of those documents are determined to be privileged/confidential, duplicates/triplicates, or wholly irrelevant and are removed from the set to be produced to the public requestor, leaving 2,856 documents to be relabeled and produced. The production set is given a new set of continuous bates numbers, omitting the duplicates, confidential, and irrelevant documents. Thus, there are no gaps in the final production numbering. However, if need be, the two sets of bates numbers could be cross-referenced when a discovery dispute arises two year later. So, document Bates No. 4,990 in the first set might become Bates No. 2,855 in the production set, but we are able to correlate those two accordingly.

74. Easily and intuitively manage key facts, issues, and parties surrounding a case

Please provide an example.

OMES Answer 74: This would chiefly be data analytics of emails, showing relationships; effective issue/fact tag; ability to sort and export by tag.

75. Quickly create automated, customizable chronologies that aren't cluttered

What data (external, reviewed, other) is a part of a customizable chronology? In what parts of the chronology does the State of OK want to customize?

OMES Answer 75: The ability to demonstrate history of iterative searches, review progress, and to modify the appearance as needed for an exhibit tailored to the particular issue presented to the court for resolution.

Also, it would be nice to have the ability to create chronologies of the actual documents being reviewed, so as to have a graphic representation of the documents' relationships to each other and events.

78. Have timeline software that supports multiple events on the same day.

Please provide examples of an "event" and what support is expected.

OMES Answer 78: This would consist of events to support reasonableness of retrieval, search, and quality control, including iterative searching, sampling, and tests for recall and precision.

See answer to No. 75 above regarding chronology/timeline functions that can support multiple documents/events entries within a single date entry.

111. Have both Windows Explorer/Outlook like view (columnar) and Google like view and ability to toggle views.

What is "Google like" view?

OMES Answer 111: A "Google like" view is a non-columnar or free text format with hypertext where applicable.

126. Allow end-user selective database field editing.

When would an end-user want to edit a database field? Please provide an example.

OMES Answer 126: This requirement has been removed from the solicitation.

127. Allow system administrator global database field editing.

When would a system admin want to edit a database field? Please provide an example.

OMES Answer 127: This requirement has been removed from the solicitation.

Page comment added by William Quinto

Clarification Questions:

Please provide the number of users expected to be trained?



OMES Answer: Since this is a proposed multi-tenant view with a few participating agencies and more to follow, it is difficult to estimate the number of users to be trained. However, the vendor should assume less than 50 and indicate how additional users will be trained as they come on to the product.

Are your users all in one office or do you have more than one office with end users?

OMES Answer: All users are not in one office.

Can you identify from the number of people expected to be trained, how many are within the Admin/IT/Collections role vs. the Legal Role?

OMES Answer: See above

Page comment added by William Quinto

What is the approximate number of Nodes?

OMES Answer: The state does not understand “Nodes” in the context of an E-discovery solution.

Page comment added by JD Leeds

Can we get some clarity around “Ability to manually load data from an online cloud-based file transfer tool.”

Also:

Please provide best estimates to the following: # of agency or department employees ?

- # of anticipated unique custodians going on Legal Hold in any given year?
- # of anticipated unique custodians having data collected from in any given year?
- Approximate time each hold is in place?
- # of estimated data sources? (i.e.Exchange, archive, File shares, Home Directories, C Drives, etc)
- # of locations (forests) where data sources reside?
- Average number of cases/year?
- Average number of active cases?
- Average case size – number of custodians?
- Average case size – GB?
- Average email/loose file mix (% by volume)?
- Largest case – GB?
- Average case duration (low/high/average in weeks)?

OMES Answer: The manual data load requirement exists for those agencies that have data or content within a cloud offering. Examples of these cloud offerings could be storage solutions, email and/or content management systems.

OMES cannot provide estimates for the items listed.