



A Preliminary Proposal to:

## The Office of the Columbus City Attorney

For a:

## Case Management System



Presented to

**Richard C. Pfeiffer, Jr.,**

City Attorney

**Lara Baker-Morrish,**

Chief Prosecutor

By

**Matrix Pointe Software, LLC**

7055 Engle Road, Suite 304

Cleveland, Ohio 44130

February 28, 2015



## Cover Letter

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March 31, 2015

Richard C. Pfeiffer, Jr.  
Lara Baker-Morrish  
375 South High Street  
Columbus, OH 43215

Re: *Matrix Pointe Software Preliminary Proposal*

Dear City Attorney Pfeiffer and Prosecutor Baker-Morrish:

We are pleased to have the opportunity to provide a preliminary Proposal for a Case Management System for your office. We are excited about the possibility of bringing increased efficiency, savings and value to your office with the same results-oriented approach that we bring to all of our clients, including Franklin County, Ohio.

We are proposing our new web-based MatrixProsecutor system. Since this is a new product, we are offering special enhancements and payment considerations that will be more fully described in "Proposal Update Summary" on page 8.

At the request of your office, we have prepared this document based on the information we currently possess. We would be happy to discuss the project timeline and milestones in more detail and make any changes required to meet your needs. Feel free to contact any of our references at your convenience.

Thank you for this opportunity to work on this important project and we look forward to working with you in the near future.

Sincerely,



Thomas J. Coury,  
*Chairman and Chief Architect*

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# Who Are We

## Matrix Pointe Software, LLC.

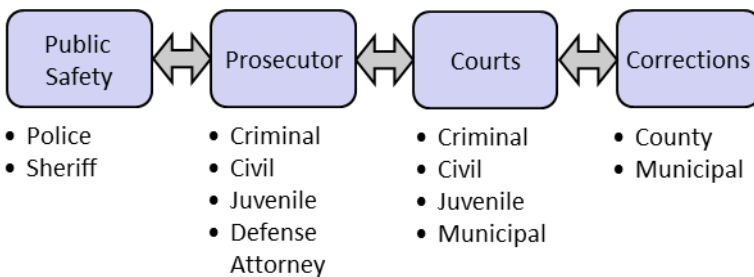
Matrix Pointe Software (Matrix), based in Cleveland, Ohio, is a leading provider of software and services for the Justice system. Used by government agencies at the state, county and local levels, our solutions allow clients to operate more efficiently and effectively while also providing a significant return on investment. We currently have approximately 30 employees including over 15 on the development staff and 4 attorneys.

Selecting a software system for your office is a difficult challenge; selecting the right software system will be critical to your success. It is our mission to improve the efficiency of the entire justice community through the delivery of innovative, integrated, cost effective, value-added software and services. Our philosophy is grounded in helping our clients and the communities they serve.

## Our Vision

Our vision includes a balanced approach of understanding requirements, business process reengineering and software automation. The process involves:

- Automating internal processes,
- Integrating the flow of information throughout the enterprise, and
- Eliminating tasks that waste time and have no added value.



These steps will enhance productivity and effectiveness while reducing costs. Our solutions improve staff productivity through automation of tasks, while reducing errors, and providing easy ways to monitor cases in each step of the prosecution process. Every office operates differently and our staff is dedicated to customizing our solutions to understand and fit your needs. We will work to identify the complex interactions between content, users, and legal rules to achieve the ideal fit for your office.

Matrix is built on our collective dedication to the legal system. We understand that the product we provide directly effects the effectiveness of your office. We strive to eliminate unproductive use of your time to allow you to concentrate on the things that matter most. We're a passionate group of professionals from various backgrounds dedicated to our clients and the products and services we provide.

We strive to use this approach to provide an integrated solution to justice requirements.

## Case Study: Cuyahoga County, Ohio

Cuyahoga County is the home of Cleveland, Ohio. Cuyahoga is the largest county in Ohio with a population of 1.3M. In 2005, the County Prosecutor's Office put forth an RFP to develop a system to help it run its office. It also requested participation in a countywide justice reform initiative. Matrix participated in both efforts and developed the MatrixProsecutor system.

### The Situation

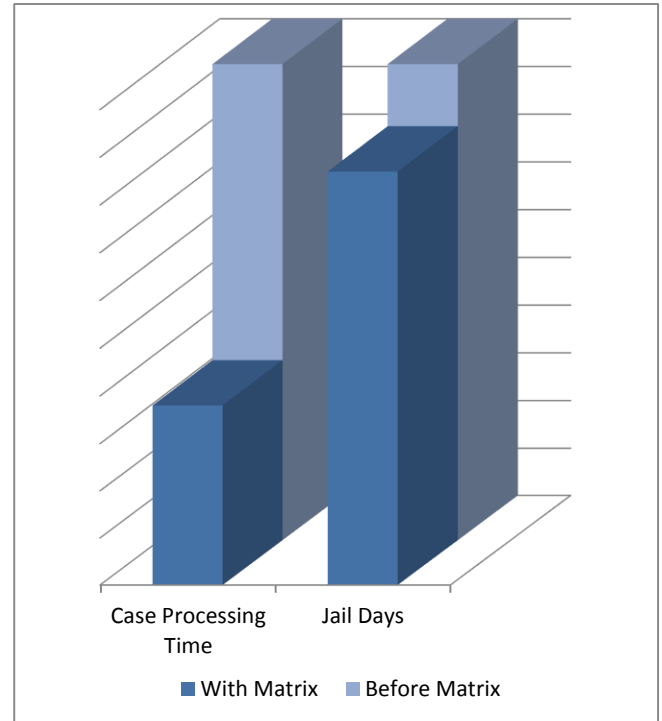
- 20,000 criminal cases a year
- 250 prosecutors
- 100 support staff
- New rules affecting discovery
- Staff bogged down in inefficiency
- Information scattered in numerous "home grown" systems and databases
- Jails over-crowded with many county inmates housed in municipal jails
- Costs rising and county revenues falling

### Action

- Lead in the analysis of the Prosecutor's office procedures and process re-engineering.
- Implemented MatrixProsecutor in August of 2008
- Integrated
  - Over 100 law enforcement agencies
  - More than 1,000 defense attorneys
  - Sheriff's inmate system

### Results

- Cut case processing time by 62%
- Reduced jail days by 13% with an annual savings of up to \$8M per year!
- Provided management tools, key performance indicators and procedures for evaluating case processing effectiveness
- Recognized \$1M annual reduction in staffing costs



"I set a goal to reform the justice system in Cuyahoga County. As a result, we have cut the average time it takes to move a case through the process by over 60%. We are also reducing jail stays, saving money and improving the efficiency of our staff. The integrated system developed by Matrix has enabled us to automate most of our internal processes and connect electronically to over 100 law enforcement agencies and approximately 1,000 defense attorneys. Because of the Matrix system, we were able to meet my goals and accommodate the new discovery requirements and deadlines."

Hon. Bill Mason, Former Prosecuting Attorney for Cuyahoga County



# Experience, Reputation and Expertise

The focus of Matrix Pointe Software is to provide solutions for governmental agencies in the area of justice. Some of our clients include:

- Athens (OH) County Prosecutor's Office, population 65,000
- Champaign (OH) County Prosecutor's Office, population 40,000
- Cuyahoga (OH) County Prosecutor's Office, population 1,270,000
- Cuyahoga (OH) County Sheriff's Office, population 1,270,000
- Defiance (OH) County Prosecutor's Office, population 39,000
- Fairfield (OH) County Prosecutor's Office, population 147,000
- Franklin (OH) County Prosecutor's Office, population 1,180,000
- Holmes (OH) County Prosecutor's Office, population 43,000
- Ohio State Board of Pharmacy
- Tuscarawas (OH) County, Prosecutor's Office, population 92,000
- Union (OH) County Prosecutor's Office, population 53,000
- Wayne (OH) County Prosecutor's Office, population 115,000
- Wood (OH) County Prosecutor's Office, population 126,000
- Hundreds of law enforcement agencies.

Some of our references are:

## **Cuyahoga County Prosecutor's Office**

Contact: Richard A. Bell  
Title: Criminal Investigations Division Chief  
Address: 1200 Ontario St, 9<sup>th</sup> Floor,  
Cleveland, OH 44113  
Phone: 216-443-6959  
Start Date: August 2008  
County Population: 1,270,000

## **Wood County Prosecutor's Office**

Contact: Hon. Paul Dobson  
Title: Prosecuting Attorney  
Address: One Courthouse Square  
Bowling Green, OH 43402  
Phone: 419-354-9250  
Start Date: June 2011  
County Population: 126,000

## **Franklin County Prosecutor's Office**

Contact: Hon. Ron O'Brien  
Title: Prosecuting Attorney  
Address: 373 South High Street,  
14<sup>th</sup> Floor  
Columbus, OH 43215  
Phone: 614-462-3555  
Start Date: May 2013  
County Population: 1,180,000

## **Union County Prosecutor's Office**

Contact: Hon. David Phillips  
Title: Prosecuting Attorney  
Address: 221 West Fifth Street,  
3<sup>rd</sup> Floor  
Marysville, OH 43040  
Phone: 937-645-4190  
Start Date: June 2010  
County Population: 53,000

## Client Testimonials

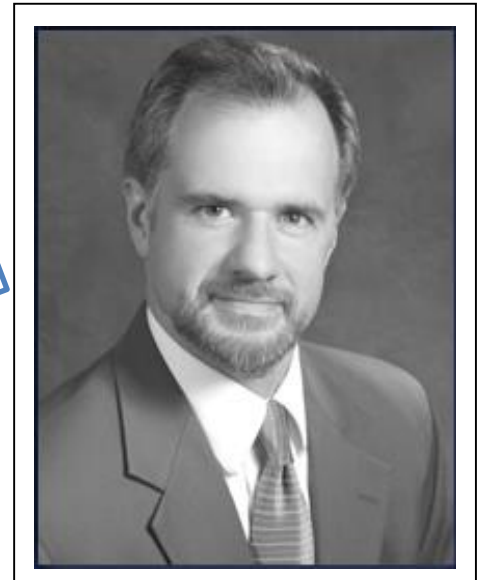


"Since our office switched to MatrixProsecutor in 2010, we have seen a dramatic improvement in our ability to handle our ever increasing caseload. MatrixProsecutor's advanced technology and integrated solutions help my office manage these cases more efficiently and effectively. Features such as the built-in charging language database, guided discovery response creation, integrated document management and assembly, and comprehensive statistical reporting have significantly improved office productivity. With MatrixProsecutor, my office was able to handle the workload without hiring additional staff."

Hon. David Phillips, Prosecuting Attorney for Union County, Ohio, May 2013

"I was skeptical to accept a comprehensive solution to case management which would include data collection from inside and outside sources, as well as data retention, file management and discovery dissemination. However, the Matrix Pointe Software has delivered on all fronts and more. The time savings in the office, from eliminating the search for paper files to instant access to case status, has increased the efficiency of all levels of the prosecutors' staff, attorneys and support staff alike. Providing access through the portal for law enforcement agencies has allowed an increased line of communication with investigators. Repeatedly, we get compliments from the defense bar in the ease and accessibility of use of the discovery portal. Most importantly for an emerging software system is the interest of the manufacturer to see the system develop in the most effective way possible. The Matrix Pointe staff repeatedly show their dedication to this goal with regular notices, updates, personal and group discussions and requests for feedback. This office has an open line of communication with Matrix Pointe staff which allows us to quickly take advantage of all the benefits of the package and allows us to provide our and other agencies considerations for improving the product. Overall, my experience with the Matrix Pointe software has made me confident that this office has partnered with an exceptional vendor who makes an exceptional product."

Hon. Paul A. Dobson, Prosecuting Attorney for Wood County,





# Proposal Update Summary

We have updated our proposal to include the following new offerings:

1. We are providing our new web-based MatrixProsecutor system. We will not require any license payment until all features are available that are found in our existing MatrixProsecutor Enterprise system. We also will not require license payment until the system is accepted by you at your discretion.
2. A new intake feature to support your unique intake process (no additional cost).
3. Added estimates for converting DVPRU, Stalking and CaseBox data.
4. If we can build automated and re-useable integration to the Arbitrator video system, we will include that as part of our product at no additional cost. As an alternative, we have quoted a specific integration just for your office.
5. Updated the technical architecture based on information from your data center.
6. We have not quoted integration to CourtView at this time.

## Project Plan

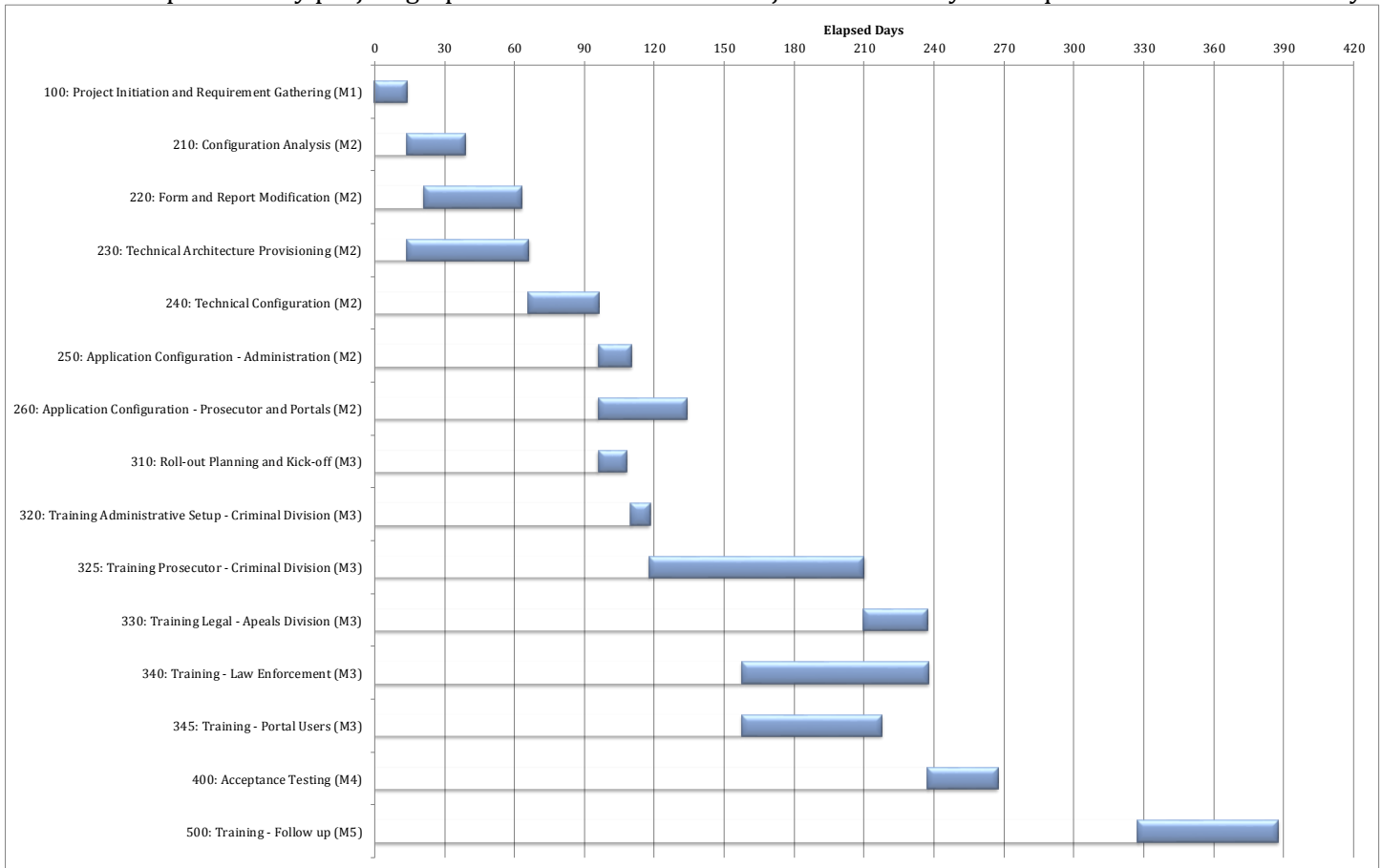
Based on other implementations, we would like to suggest a preliminary plan. Plan details may be found in Attachment 1. We look forward to working with you to develop a detailed project plan specific to your requirements. The table below summarizes the key milestones of our project:

<b>M1 &amp; M2: Configuration and Installation</b>	<p>We will provide a series of documents to be completed by your office to help us understand your configuration requirements. We will work with you to review them and discuss work process, training schedules, conversion procedures, integration requirements and on-going support.</p> <p>The software will be configured to your environment. We will customize key pleadings documents to meet your requirements. These documents include charging instruments, discovery pleadings and other court filings you require.</p>
<b>M3: Training for Your staff and External Users</b>	<p>We provide an extensive training program on-site, with your staff and with real cases if practical. We can conduct training at various levels and work with “super users” you select to become system experts.</p> <p>We also provide detailed training for portal users. The law enforcement training efforts may be reduced as a result of the Franklin County implementation.</p>
<b>M4: Acceptance Testing</b>	<p>The application will be tested by the end user to assess if the system is operating as expected.</p>
<b>M5: Post-Production Training</b>	<p>After the system is live, we will provide additional on-site training to ensure a smooth transition to full operational use.</p>
<b>Follow-up Training and Ongoing Support</b>	<p>Unlimited phone and email support is available during business hours. After-hour support is available upon request. Upon request, we will provide additional training as needed.</p>



# Project Graph

Below is a preliminary project graph. The timelines will be adjusted to meet your requirements and availability.



# Pricing

## City of Columbus Licensed Solution and Maintenance

The table below summarizes the pricing options for the City of Columbus Hosted Licensing Solution for our software:

Product Name	Product Description	Qty	Unit of Measure	State Price	Total
1 MatrixProsecutor	MatrixProsecutor License	100	Named User License	3,250.00	325,000.00
2 MatrixCrime	MatrixCrime Site License	1	Site	45,000.00	45,000.00
3 MatrixDiscovery	MatrixDiscovery Site License	1	Site	25,000.00	25,000.00
4 MatrixClerk	MatrixClerk Site License	1	Site	8,500.00	8,500.00
5 MatrixProbation Portal	MatrixProbation Portal License	1	Site	8,500.00	8,500.00
6 Legal Support Services	Legal Support Services	760	Hours	175.00	133,000.00
7 Software Engineering Services	Software Engineering Services	332	Hours	150.00	49,800.00
					594,800.00
<b>After Year 1</b>					
1 MatrixProsecutor Maintenance	MatrixProsecutor Maintenance	15%	% Software License		61,800.00
2 Professional Services	Follow-up Training if Requested	200	Hours	175.00	35,000.00
					96,800.00

This proposal contains confidential and trade secret information. It may not be released without redaction.

Hours presented would be not to exceed estimates. We may want to consider adding a contingency amount of hours for contracting purposes. All hours would be charged based on actual time spent and assigned at your approval.

Annual Maintenance includes software updates, maintenance, legal updates and unlimited business hour support by email or phone. It would begin after implementation acceptance and approval by you.

The technical architecture for the system can be found in Attachment 2.

## And Finally...

Thank you for taking the time to review this preliminary proposal. Please contact us at your convenience. Your primary contacts are:

Thomas J. Coury  
Chairman and Chief Software Architect  
Matrix Pointe Software  
[tc@matrixpointesoftware.com](mailto:tc@matrixpointesoftware.com)  
(216) 456-8860

We would be pleased to provide you with any additional information you may need to arrive at your decision. We look forward to hearing from you and to working with you in your important work at the Columbus City Attorney's Office.



## Attachment 1 – Initial Work Plan



# Work Plan for Matrix Services

Title	175.00 LSS Hrs.	150.00 SES Hrs.	Tot. Hrs.	Hrs/Session	# of Sessions
<b>100.00 Project Initiation and Requirement Gathering (M1)</b>	<b>34.00</b>	-	<b>34.00</b>		
100.05 Project Initiation	1.00		1.00		
100.10 PM Introduction meeting With Prosecutor	2.00		2.00		
100.15 Create Project Archives, Support & Tracking	2.00		2.00		
100.20 Review & Provide to Client the Pre-Impl Q & Req'd Docs	1.00		1.00		
100.25 Receive & Validated Compl Pre-Impl Q & Req'd Docs	16.00		16.00		
100.30 Translate Client Rqmts to Format For TechSrv & Dev Teams	10.00		10.00		
100.35 Revise Internal Project Plan	2.00		2.00		
	<b>34.00</b>	-	<b>34.00</b>		
<b>Milestone 1 (M1) - Project Initiation</b>	<b>34.00</b>	-	<b>34.00</b>		
<b>200.00 Configuration Analysis and Implementation (M2)</b>	<b>223.00</b>	<b>296.00</b>	<b>519.00</b>		
<b>210.00 Configuration Analysis (M2)</b>	<b>60.00</b>	-	<b>60.00</b>		
210.05 Config - Analyze Document Mgt, file room, mail room and scanning functions (Client interviews/feedback)	6.00		6.00		
210.10 Config - Analyze Case Intake -Adult Criminal (client interviews/feedback)	8.00		8.00		
210.15 Config - Analyze Charging work flow (client interviews/feedback)	8.00		8.00		
210.20 Config - Analyze Municipal Sentencing work flow (Imposition, Prob. Viol., Fines, court costs, etc) (client interviews/feedback)	4.00		4.00		
210.25 Config - Analyze Other Alternative Programs work flow (client interviews/feedback)	6.00		6.00		
210.30 Config - Analyze Victim Notification work flow (client interviews/feedback)	4.00		4.00		
210.35 Config - Analyze Billing (forfeiture, restitution, etc) work flow (client interviews/feedback)	4.00		4.00		
210.40 Config - Analyze Civil/Legal case work flow (client interviews/feedback)	20.00		20.00		
	<b>60.00</b>	-	<b>60.00</b>		
<b>220.00 Form and Report Modification (M2)</b>	<b>40.00</b>	<b>100.00</b>	<b>140.00</b>		
220.05 Config - Develop Case File Batch Printing (Intake)	4.00	16.00	20.00		
220.10 Config - Develop Forms/Reports-Charging Instruments	8.00	20.00	28.00		
220.15 Config - Develop Forms/Reports-Discovery	4.00	16.00	20.00		
220.20 Config - Develop Forms/Reports-Plea Agreement	8.00	16.00	24.00		
220.25 Config - Develop Forms/Reports-Billing	4.00	16.00	20.00		
220.30 Config - Develop Forms/Reports-Victim Rights & Notification Letter	8.00	16.00	24.00		
220.35 Config - Develop Word Merge Templates (Initial)	4.00		4.00		
	<b>40.00</b>	<b>100.00</b>	<b>140.00</b>		
<b>230.00 Technical Architecture Provisioning (M2)</b>	-	<b>124.00</b>	<b>124.00</b>		
230.05 Assist in Software / Hardware ordering and provisioning		40.00	40.00		
230.10 Assist in server configuration		32.00	32.00		
230.15 Create New Databases for new County - (PreReq to other Dev Tasks)		8.00	8.00		
230.20 Configure Databases - (Pre-Req to other Dev Tasks)		4.00	4.00		
230.25 Configure Email Notifications		4.00	4.00		
230.30 Setup CRIME/Prosecutor Synchronization/Purge job		4.00	4.00		
230.35 Give New County Users Access to Training Database		4.00	4.00		
230.40 Setup & Test Service Broker		4.00	4.00		
230.45 Install All Windows Services & Setup DB Connection Configs		4.00	4.00		
230.50 Setup All Web services (Print, Scan Intake, Signing, etc) & Setup DB Connection Configs		8.00	8.00		
230.55 Setup DocuPointe Repository Folders		4.00	4.00		
230.60 Configure Full Text Search		4.00	4.00		
230.65 Setup the Dashboard		4.00	4.00		
	-	<b>124.00</b>	<b>124.00</b>		
<b>240.00 Technical Configuration (M2)</b>	-	<b>72.00</b>	<b>72.00</b>		
240.05 Configure all servers		40.00	40.00		
240.10 Configure database settings		12.00	12.00		
240.15 Configure web settings		12.00	12.00		
240.20 Configure all reports and forms		8.00	8.00		
	-	<b>72.00</b>	<b>72.00</b>		
<b>250.00 Application Configuration - Administration (M2)</b>	<b>33.00</b>	-	<b>33.00</b>		
250.05 Config ADMN - Setup Dpts, Grps, Roles	2.00		2.00		
250.10 Config ADMN - Setup Users (initial)	10.00		10.00		



# Work Plan for Matrix Services

Title	175.00 LSS Hrs.	150.00 SES Hrs.	Tot. Hrs.	Hrs/Session	# of Sessions
250.15 Config ADMN - Permissions	4.00		4.00		
250.20 Config ADMN - Address Book	6.00		6.00		
250.25 Config ADMN - Crime Admn, S/User, Matrix Support	2.00		2.00		
250.30 Config ADMN - Initial Sys Preferences	2.00		2.00		
250.35 Config ADMN - Calendar	2.00		2.00		
250.40 Config ADMN - Stamps	2.00		2.00		
250.45 Config ADMN - Routes	2.00		2.00		
250.50 Config ADMN - Signature Registration	1.00		1.00		
	<b>33.00</b>	-	<b>33.00</b>		
<b>260.00 Application Configuration - Prosecutor and Portals (M2)</b>	<b>90.00</b>	-	<b>90.00</b>		
260.05 Config PROS - Update county name for Client County	4.00		4.00		
260.10 Config PROS - Permissions	4.00		4.00		
260.15 Config PROS - Codes Tables	8.00		8.00		
260.20 Config PROS - Charging Instruments - Client approval on final versions	8.00		8.00		
260.25 Config PROS - Speedy Trial Time Tolls	2.00		2.00		
260.30 Config Legal (including work flows)	20.00		20.00		
260.35 Config CRIME (set up LE agencies)	8.00		8.00		
260.40 Config CLERK	4.00		4.00		
260.45 Validate - Sys Setup & Config	8.00		8.00		
260.50 Validate - Sys Setup & Config - Input Sample Cases (all types)	16.00		16.00		
260.55 Validate - Sys Setup & Config - User Ids & Sign-ons	4.00		4.00		
260.60 Validate - Sys Setup & Config - Other Data and Forms	4.00		4.00		
	<b>90.00</b>	-	<b>90.00</b>		
<b>Milestone 2 (M2) - Configuration and Installation Complete</b>	<b>223.00</b>	<b>296.00</b>	<b>519.00</b>		
<b>300.00 Training</b>	<b>363.00</b>	<b>16.00</b>	<b>379.00</b>		
<b>310.00 Roll-out Planning and Kick-off (M3)</b>	<b>28.00</b>	<b>16.00</b>	<b>44.00</b>		
310.05 Plan & Prep For the Client Kick-off Meeting	4.00		4.00		
310.10 Prep Kick-off: Create Ex Doc Fmts For Client Approval	8.00		8.00		
310.15 Prep Kick-off: Assemble Materials For Client Kick-off Mtg	4.00		4.00		
310.20 Conduct Kick-off w/Prosecutor, S/User, Policy Admnstr	2.00		2.00		
310.25 Perform Client Office Technical Installation		16.00	16.00		
310.30 Get Document Formats Approved By Prosecutor (e.g. email notifications)	2.00		2.00		
310.35 Provide Approved Doc Fmts to Development Team	4.00		4.00		
310.40 Kick-off w/Key Office Personal	2.00		2.00		
310.45 Kick-off w/ Entire Office - Elected opens proceedings	2.00		2.00		
	<b>28.00</b>	<b>16.00</b>	<b>44.00</b>		
<b>320.00 Training Administrative Setup - Criminal Division (M3)</b>	<b>20.00</b>	-	<b>20.00</b>		
320.10 Train Admin: Maint-Address Book (S/User)	4.00		4.00	2.00	2.00
320.20 Train Admin: Address Book- Breakout	2.00		2.00	1.00	2.00
320.30 Train Admin: Maint-Departments/Groups/Roles (S/User)	1.00		1.00	1.00	1.00
320.40 Train Admin: Users, Permissions (S/User)	2.00		2.00	2.00	1.00
320.50 Train Admin: User Setup - Breakout	2.00		2.00	2.00	1.00
320.60 Train Admin: CRIME Admin User (S/User)	2.00		2.00	2.00	1.00
320.70 Train Admin: Review Sys Preferences (S/User)	1.00		1.00	1.00	1.00
320.80 Train Admin: Calendar Setup, Stamps (S/User)	2.00		2.00	2.00	1.00
320.90 Train Admin: Define Routes (S/User)	2.00		2.00	2.00	1.00
321.00 Train Admin: Victim Notification	2.00		2.00	2.00	1.00
	<b>20.00</b>	-	<b>20.00</b>		
<b>325.00 Training Prosecutor - Criminal Division (M3)</b>	<b>111.00</b>	-	<b>111.00</b>		
325.05 Train Pros: Q&A Review (S/User)	4.00		4.00	2.00	2.00
325.10 Train Pros: Permissions, Codes Tables (S/User)	2.00		2.00	1.00	2.00
325.15 Train Pros: Prosecutor Assignment (S/User)	2.00		2.00	2.00	1.00
325.20 Train: Scanning, Document Mgt, Mail processing	4.00		4.00	2.00	2.00
325.25 Train Pros: Case Management Matrix Overview (Criminal, APAs, Staff, S/User)	4.00		4.00	2.00	2.00
325.30 Train Pros: Criminal Matter Overview (Part 1) (Criminal, APAs, Staff, S/User)	4.00		4.00	2.00	2.00
325.35 Train Pros: Case Intake (Criminal) Part-1, (Criminal Intake Staff, S/Users)	2.00		2.00	2.00	1.00
325.40 Train Pros: Case Intake (Adult) Break-out Session, (Adult Intake Staff, S/Users)	2.00		2.00	2.00	1.00
325.45 Train Pros: Q&A Review (SuperUsers)	1.00		1.00	1.00	1.00
325.50 Train Pros: MatrixCrime for case intake (Support Staff, S/User)	2.00		2.00	2.00	1.00
325.55 Train Pros: Criminal Matter Review (Part 1) (Criminal, APAs, Staff, S/User)	2.00		2.00	2.00	1.00



# Work Plan for Matrix Services

		175.00	150.00			
Title		LSS Hrs.	SES Hrs.	Tot. Hrs.	Hrs/Session	# of Sessions
325.60	Train Pros: Breakout Session	2.00		2.00	2.00	1.00
325.65	Train Pros: Special Training - Prosecutor Assignment (S/User)	2.00		2.00	2.00	1.00
325.70	Train Pros: Case Intake (Adult) Part-2, (Adult Support Staff, S/User)	2.00		2.00	2.00	1.00
325.75	Train Pros: Breakout Session	1.00		1.00	1.00	1.00
325.80	Train Pros: Q&A Review (S/Users)	1.00		1.00	1.00	1.00
325.85	Train Pros: Review and workflow follow up - Case Intake (Adult)	2.00		2.00	2.00	1.00
325.90	Train Pros: Install Topaz, Sign Registration, Speed Trial Time Tolls (S/Users)	1.00		1.00	1.00	1.00
325.95	Train Pros: Charging Instruments - Session 1 (All APAs, S/User)	4.00		4.00	2.00	2.00
326.00	Train Pros: Breakout Session	4.00		4.00	2.00	2.00
326.05	Train Pros: Ongoing Case Mgmt - Documents - Session 1 (Adult Support Staff, S/Users)					
		4.00		4.00	2.00	2.00
326.10	Train Pros: Breakout Session	2.00		2.00	2.00	1.00
326.15	Train Pros: Q&A Review (S/Users)	1.00		1.00	1.00	1.00
326.20	Train Pros: Review and workflow follow up - Case Intake	2.00		2.00	2.00	1.00
326.25	Train Pros: Criminal Matter Overview Part 2 (APAs-Adult, S/Users)	2.00		2.00	2.00	1.00
326.30	Train Pros: On-Going Case Mgmt - Part 2 (Adult Support Staff, S/User)	2.00		2.00	2.00	1.00
326.35	Train Pros: Breakout Session	2.00		2.00	2.00	1.00
326.40	Train Pros: Speedy Trial (APAs, Support Staff, S/User)	2.00		2.00	2.00	1.00
326.45	Train Pros: Q&A Review (S/User)	1.00		1.00	1.00	1.00
326.50	Train Pros: Discovery -Adult- (Support Staff, APAs, S/User)	4.00		4.00	2.00	2.00
326.55	Train Pros: Criminal Matter - Case Mgmt Rvw (Adult) - Part 3 (APAs - Adult, S/Users)					
		2.00		2.00	2.00	1.00
326.60	Train Pros: On-going Case Mgmt (APAs, Support Staff, S/Users)	2.00		2.00	2.00	1.00
326.65	Train Pros: Breakout Session	2.00		2.00	2.00	1.00
326.70	Train Pros: Charging Instruments - Review(APAs, S/User)	1.00		1.00	1.00	1.00
326.75	Train Pros: Breakout Session	1.00		1.00	1.00	1.00
326.80	Train Pros: Q&A Review (S/Users)	1.00		1.00	1.00	1.00
326.85	Train Pros: Word Merge Templates (S/Users)	2.00		2.00	2.00	1.00
326.90	Train Pros: Breakout Session	1.00		1.00	1.00	1.00
326.95	Train Pros: Work Views (S/Users)	2.00		2.00	1.00	2.00
327.00	Train Pros: Breakout Session	1.00		1.00	1.00	1.00
327.05	Train Pros: Criminal Matter - Prosecutor Work List Rvw (APAs - Adult, S/User)	2.00		2.00	1.00	2.00
327.10	Train Pros: Case Mgmt - Review (APAs, Support Staff)	2.00		2.00	2.00	1.00
327.15	Train Pros: Discovery - Review (Staff, APA, S/User)	2.00		2.00	2.00	1.00
327.20	Train Pros: - 1st Appearance Docket, Exam Hearing (Staff Support, S/User)	1.00		1.00		
327.25	Train Pros: Q&A Review (S/Users)	1.00		1.00	1.00	1.00
327.30	Train Pros: Defining Routes, Task Templates (S/User)	1.00		1.00	1.00	1.00
327.35	Train Pros: Document Mgmt (All Staff)	2.00		2.00	1.00	2.00
327.40	Train Pros: Victim Notification (Staff Support, S/User)	2.00		2.00	2.00	1.00
327.45	Train Pros: Plea & Sentencing Setup (S/User)	1.00		1.00		
327.50	Train Pros: Plea Marking (APAs, S/User)	2.00		2.00	1.00	2.00
327.55	Train Pros: Sentencing (APAs, Support Staff, S/User)	2.00		2.00	1.00	2.00
327.60	Train Pros: Billing-Forfeiture, Restitution, Process Receipts (S/User)	2.00		2.00	2.00	1.00
327.65	Train Pros: Tools Review (S/Users)	2.00		2.00		
327.70	Train Pros: Maintenance Review (S/Users)	2.00		2.00		
327.75	Train Pros: Reports, Word Merge, Forms, Views (S/Users)	2.00		2.00	2.00	1.00
		<b>111.00</b>	-	<b>111.00</b>		
<b>330.00</b>	<b>Training Legal - Appeals Division (M3)</b>	<b>64.00</b>	-	<b>64.00</b>		
330.05	Train Admin: Appeals Matter Type (Staff, APA, S/User)	8.00		8.00	2.00	4.00
330.10	Train Pros: Appeals Matter & Appeals Matter Worklist (Staff, APA, S/User)	16.00		16.00	2.00	8.00
330.15	Train Pros: Appeals Matter Review, Work Flow, Documents, Notes, Tasks(Staff, APA, S/User)	16.00		16.00	2.00	8.00
330.20	Train Pros: Tools Review (S/Users)	2.00		2.00		
330.25	Train Pros: Review and Work flow follow up	8.00		8.00	2.00	4.00
330.30	Train Pros: Maintenance Review (S/Users)	2.00		2.00		
330.35	Train Pros: Word Merge Templates (S/User)	4.00		4.00	2.00	2.00
330.40	Train Pros: Breakout Session	8.00		8.00	2.00	4.00
		<b>64.00</b>	-	<b>64.00</b>		
<b>340.00</b>	<b>Training - Law Enforcement (M3)</b>	<b>108.00</b>	-	<b>108.00</b>		
340.05	Crime - Introduction & Demo - LE Agencies	12.00		12.00	3.00	4.00
340.10	Train Crime - LE Agencies	96.00		96.00	3.00	32.00
		<b>108.00</b>	-	<b>108.00</b>		
<b>345.00</b>	<b>Training - Portal Users (M3)</b>	<b>32.00</b>	-	<b>32.00</b>		



# Work Plan for Matrix Services

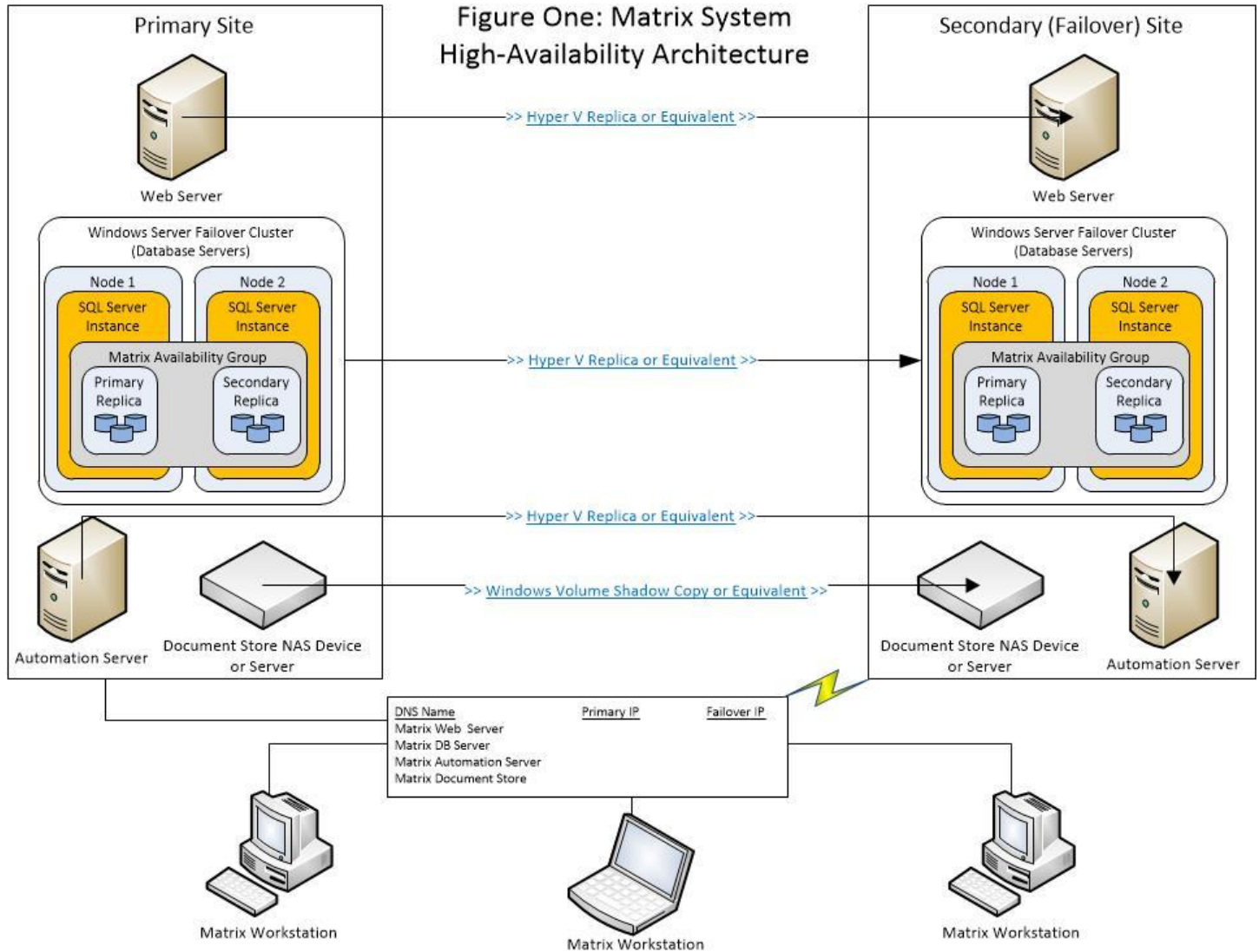
Title	175.00 LSS Hrs.	150.00 SES Hrs.	Tot. Hrs.	Hrs/Session	# of Sessions
345.05 Train Defense Attorneys: Discovery, DAP	16.00		16.00	2.00	8.00
345.10 Train Clerk's Office: Clerk Portal	8.00		8.00	2.00	4.00
345.15 Train Probation Department: Probation Portal	8.00		8.00	2.00	4.00
	<b>32.00</b>	-	<b>32.00</b>		
<b>Milestone 3 (M3) - User Training Complete</b>	<b>363.00</b>	<b>16.00</b>	<b>379.00</b>		
<b>400.00 Acceptance Testing (M4)</b>	<b>20.00</b>	<b>20.00</b>	<b>40.00</b>		
400.05 Final system review and acceptance test	20.00	20.00	40.00		
	<b>20.00</b>	<b>20.00</b>	<b>40.00</b>		
<b>Milestone 4 (M4) - Acceptance Testing</b>	<b>20.00</b>	<b>20.00</b>	<b>40.00</b>		
<b>500.00 Training - Follow up (M5)</b>	<b>120.00</b>	-	<b>120.00</b>		
500.05 Train Pros - After Training Session 1 - On-site Q&A Review, Support As Needed	40.00		40.00		
500.10 Train Pros - After Training Session 2 - On-site Q&A Review, Support As Needed	40.00		40.00		
500.15 Train Pros Office - After Training Session 2 - On-site Q&A Review, Support As Needed	40.00		40.00		
	<b>120.00</b>	-	<b>120.00</b>		
<b>Milestone 5 (M5) - Training Follow up Complete</b>	<b>120.00</b>	-	<b>120.00</b>		
<b>Project Total</b>	<b>760.00</b>	<b>332.00</b>	<b>1,092.00</b>		



# Attachment 2 – Technical Architecture for an In-House Solution

This document details the hardware and software requirements for hosting and using the Matrix system. All hardware specifications represent **minimum suggestions for optimal performance**.

## Potential Architecture as Discussed



## Server Requirements

### Database Server

2 Processors: Intel Xeon Processor X7350 @ 2.93 GHz, 2933 Mhz, 4 Cores, 4 Logical Processors  
48 GB RAM  
64-bit Operating System  
Windows Server 2008 R2 Standard SP1  
Microsoft SQL Server 2008 Standard SP3 (Enterprise Edition adds more features if available)  
System/Data Volume: 1 TB, RAID 1 or Raid 10 (Drive Spindle speed 7200RPM or better)  
Prosecutor Log Volume: 500gb+ RAID 1 or 10 (Separate Disks from System Volume) (Drive Spindle speed 7200RPM or better)  
Website Log Volume: 500gb+ RAID 1 or 10 (Separate Disks from System Volume) (Drive Spindle speed 7200RPM or better)

### Web Server

Processor: Intel Xeon Processor E5440 @ 2.83 GHz, 2833 Mhz, 4 Cores, 4 Logical Processors  
8 GB RAM  
64-bit Operating System  
Windows Server 2008 R2 Standard SP1

### Processing and Automation Server

Hosts Windows Services that perform various automated workflow processes, Document Processing, etc.  
Processor: Intel Xeon Processor E5440 @ 2.83 GHz, 2833 Mhz, 4 Cores, 4 Logical Processors  
8 GB RAM  
64-bit Operating System  
Windows Server 2008 R2 Standard SP1

### Document Store

The document store should be hosted on a dedicated NAS device, or a File Server with between 2-4 Tb of capacity, operating in RAID 5 (preferably with a hot spare configured, or an offline but ready-to-go spare drive) or RAID 10 (With spare drive(s) on hand.)

Other Third Party Licenses Necessary for the Matrix System:

Component Name	License	Required
Database Server Monitoring	Confio Ignite/SQL	Desired
Processing and Automation Server	activePDF DocConverter Enterprise	Yes
	Microsoft Office Standard	Yes
Batch Printing Daemon	Adobe Acrobat	Yes

### Workstation Requirements

- A windows based computer running a minimum of Windows 7.
- A minimum of 4gb of ram but 8gb is recommended.
- Internet Explorer 9 or later is required.
- Please consider providing workstations with two monitors, and laptops with docking stations with an additional monitor attached.