

**JUSTIFICATION FOR NON-COMPETITIVE PROCUREMENT**

**COMPLETE THIS SECTION IF NEW CONTRACT**

For contract(s) in this request, answer applicable questions in each of the 4 major subject areas below in accordance with the Instructions for Preparation of Non-Competitive Procurement Form on the reverse side.

Request that negotiations be conducted only with TeamConnect Enterprise for the product and/or services described herein.  
 (Name of Person or Firm)

This is a request for \_\_\_\_\_ (One-Time Contractor Requisition # \_\_\_\_\_, copy attached) or Three-Year Term Agreement or \_\_\_\_\_ Delegate Agency (Check one). If Delegate Agency, this request is for "blanket approval" of all contracts within the \_\_\_\_\_ (Attach List) Pre-Assigned Specification No. \_\_\_\_\_ (Program Name) Pre-Assigned Contract No. \_\_\_\_\_

**COMPLETE THIS SECTION IF AMENDMENT OR MODIFICATION TO CONTRACT**

Describe in detail the change in terms of dollars, time period, scope of services, etc., its relationship to the original contract and the specific reasons for the change. Indicate both the original and the adjusted contract amount and/or expiration date with this change, as applicable. Attach copy of all supporting documents. Request approval for a contract amendment or modification to the following:

Contract #: \_\_\_\_\_ Company or Agency Name: \_\_\_\_\_  
 Specification #: \_\_\_\_\_ Contract or Program Description: \_\_\_\_\_  
 Mod. #: \_\_\_\_\_ (Attach List, if multiple)

\_\_\_\_\_  
 Originator Name Telephone Signature Department Date

Indicate SEE ATTACHED in each box below if additional space needed:

<input checked="" type="checkbox"/> PROCUREMENT HISTORY	See Attached
<input checked="" type="checkbox"/> ESTIMATED COST	See Attached <b>S. S. R. B.</b> DATE <u>6-15-06</u> APPROVED <u>3-0-1</u>
<input checked="" type="checkbox"/> SCHEDULE REQUIREMENTS	See Attached CONDITIONALLY APPROVED _____
<input checked="" type="checkbox"/> EXCLUSIVE OR UNIQUE CAPABILITY	See Attached RETURN TO DEPT _____ DISAPPROVED _____
<input type="checkbox"/> OTHER	

APPROVED BY: [Signature] 5/29/06 DATE  
 DEPARTMENT HEAD OR DESIGNEE  
[Signature] BOARD CHAIRPERSON  
 6/16/06 DATE

## Procurement History:

The Chicago Law Department originally identified the need for a Legal Case Management System (LCMS) in the early 1990s. At that time a number of solutions were identified and evaluated. In 1995, the Department attempted to address many of its needs by purchasing a client/server product called LegalEdge(PC Venture). LegalEdge (PC Venture) was contracted out and an initial rollout and implementation was undertaken the next two years in the Torts Division and, on a partial basis, the Contracts Division. At that time, this software was chosen with the approval of the then sole source committee.

Since that time, the Law Department identified several limitations with the product which prevented it from fully addressing the needs of its users. Department-wide implementation of this particular product was halted due to the following issues:

- Product customization issues
- Data conversion issues
- Functional deficiencies
- Training inadequacies
- Product support deficiencies and general dissatisfaction with the responsiveness of the company
- The product is not user-friendly

The Law Department halted further customization expenditures in 2001. The company did however, make some customization changes on a *pro bono* basis in an effort to re-establish the existing contract, but it provided limited benefit to the two user Divisions.

The Law Department learned from this experience that it has unique LCMS needs and a number of requirements specific to the nature of work we perform. The Law Department is requesting that negotiations be conducted to purchase a product that is flexible and easy to use; robust with functionality but can provide basic features with little training; supports simple tasks as well as highly complicated tasks; is adaptable to the need of the various practice areas in the Department (a very key feature); and enables attorneys to share, collaborate and locate pertinent information in the most productive environment possible.

In order to reach these goals, in 2002, under a management consulting RFS the Law Department hired Peterson (now Navigant) consulting company to accomplish two tasks: evaluate the department's existing infrastructure and business requirements and recommend an "off the shelf" LCMS product that best fits the City work environment.

Peterson Consulting (with its MBE/WBE sub-contractors Blackwell Consulting) performed an extensive study, a portion of which was based upon interviews conducted with each of the various practice areas in the Department. The study included a gap analysis and recommendations for highly customizable commercial software taking into account the unique city back end database standards under the Oracle platform as well as the desirability of the Law

Department to have a web based LCMS application that would be easy to use and based on city web standards. The Law Department along with members of BIS conducted a series of demonstrations and evaluations. At that time, the Department narrowed the field from the four proposed vendors (one of them being LegalEdge itself) to two contenders. Unfortunately extraneous constraints beyond the control of the Law Department prevented it from selecting and implementing the study recommendations.

Subsequent discussions in 2005 and 2006 between DPS, OBM, BIS and the Law Department identified the need for revisiting the study, selecting and implementing such a system in the Law Department. For this, the original two vendors were re-invited. Of those two vendors, one declined due to a company re-organization. (The other vendor is the company that the Department is requesting negotiations to be conducted with: Mitratesh). At this point the Law Department felt that it should conduct a renewed demonstration and interview by another focus group, which included a cross section of stakeholders that included department users with different business needs as well as representatives from other city departments.

The Law Department still wanted to follow the recommendations of the Peterson Study, it was therefore decided to compare the features and capabilities of the two remaining vendors. This renewed and refreshed the commitment of the stakeholders and gave the remaining two vendors an opportunity to showcase their business achievements, refined application functionality as well as their technical enhancements in the last couple of years. Based on the two remaining vendors, this focus group quickly discovered that the Mitratesh product was far superior than the other vendor based on its features, its framework and compatibility with the City's framework, the needs of the department, its stakeholders, and the clientele of the company.

During this time, the Law Department needed to determine how it could successfully implement such a highly customized solution without experiencing the pitfalls it had had with its original product. The Department requested the approval of the CIO, and the project was then broken down into two portions.

- A Task Order Request (TOR) directed to an implementation vendor as approved by all parties and under the Master Consulting Agreement (MCA)
- A request to negotiate a non-competitive procurement purchase of the software:  
TeamConnect Enterprise owned by Mitratesh Holdings, Inc.  
located at 5900 Wilshire Blvd, Suite 1500, Los Angeles, CA 90036

Based on subsequent conversations between the Chief Procurement Officer and the Corporation Counsel, a directed TOR has been approved under the MCA

**Estimated Cost:**

Bellow is the estimated cost of software licenses as quoted by the software vendor at the end of December 2005. These prices will not be currently valid but are a reflection of the estimated costs. With the approval of the Board, the Law Department would like to negotiate on pricing for added cost savings.

The Annual Maintenance cost has been calculated at 22% of the revised figures by the Law Department (Originally Mitratesch had quoted \$194,659 but because the Law Department broke the project into two pieces, these costs are also estimated to be reduced). The Law Department also intends to negotiate this percentage cost for added savings. The Department is seeking a three year maintenance contract term, with an optional two year extension beginning at the completion of the implementation of the software for the entire department under the TOR. It is anticipated that this software maintenance cost will include software updates, patches and fixes. Depending upon the Implementation Plan (TOR), this may start sooner or later. At this particular time this is anticipated to start as of January 2008.

The Law Department also intends to negotiate a Warranty period for the software as well as an Escrow holding account for the "source code" of the software. These charges are to be determined.

**The City of Chicago 12.28.05**

Category	Software (Estimated)	Qty.	Price	Extension
<b>Mitratesch Software</b>	TeamConnect Enterprise v.2.x Legal Server Workgroup Edition	1	\$50,000	\$50,000
	TeamConnect Enterprise v.2.x Legal User License Fee (1-200)	200	\$1,500	\$300,000
	TeamConnect Enterprise v.2.x Legal User License Fee (201-400)	200	\$1,250	\$250,000
	TeamConnect Enterprise v2.x Legal User License Fee (401-500)	100	\$1,000	\$100,000
	TeamConnect Generic BusinessObjects Universe v.2.x	1	\$25,000	\$25,000
				<b>Software Total</b>
<b>Annual Maintenance (Estimated)</b>				
<b>Software Maintenance</b>	Mitratesch Annual Software Maintenance (Year 1)	22%		\$159,500
	Mitratesch Annual Software Maintenance (Year 2)	22%		\$159,500
	Mitratesch Annual Software Maintenance (Year 3)	22%		\$159,500
			<b>Maintenance Total</b>	<b>\$478,500</b>
<b>Price Summary (ESTIMATED)</b>			<b>Software Total</b>	<b>\$725,000</b>
			<b>Maintenance Total</b>	<b>\$478,500</b>
			<b>Grand Total</b>	
			<b>(for 3 years)</b>	<b>\$1,203,500</b>

**Please Note:** after the first three (3) years, the Law Department may want to negotiate an optional two (2) year contract extension period. Those prices are to be determined.

### **Schedule Requirements:**

- The Law Department anticipates that it would start the project on June 16, 2006 and complete the implementation by January 31, 2008.
- The Law Department would like to get authorization to purchase the software and anticipates the following general schedule:
  - Approval from board
  - Contract Agreement with Vendor
  - Purchase of software
  - Receipt of product

→ *The rest of this schedule will be followed for each of the sixteen (16) Law Department divisions*

- The Law Department plans to implement the software system by division and practice areas (type of law) with each division having a highly customized module exclusive to the divisional needs as outlined above.
  - Design
  - Application Configuration
  - Report Development
  - Testing/User acceptance testing
  - Conversion
  - Interface development (as required)
  - Acceptance
  - Super User/End User Training
  - GO LIVE
- The annual software maintenance agreement for upgrades, tweaks, enhancements would start in January 2008 (anticipated) with the software vendor.
- This general schedule is outlined in further detail in the Task Order Request (TOR) under the Master Consulting Agreement (MCA) for implementation services. The TOR can be provided with this document as a supplement if needed.

**Exclusive or Unique Capabilities:**

- The Law Department considers the following unique traits of the Mitratesch Team Connect Enterprise software. They are exclusive traits that are prevalent in Law firms and Corporate Law Departments.
  - Event management such as attorney docketing/calendaring/scheduling
  - Case notes
  - Collaboration
  - Global case and knowledge management via modular components
  - Case progress tracking
  - Case and document templating and formatting
  - Matter, document and content management
  - Litigation support using tools like bates numbering, ties to legal research and investigative search engines, document comparison tools
  - Financial management using tools such as such as case cost tracking, cost recovery outside counsel cost tracking
  - Contact and Resource management such as expert witnesses
  - Productivity management
  - Trend analysis and reporting
  - Legal desktop dashboards
  - Discovery (both electronic and other)
  - Risk management
  
- The Law Department also feels that the Mitratesch software is flexible enough for the various practices (types) of legal work that the Chicago Law Department conducts. These general areas include litigation law, transaction law, compliance law, investigative and discovery work, outside counsel management, budgeting and reporting, workflow processes, knowledge management and performance measurements.
  
- The uniqueness of the various practice areas of the Law Department as it relates to all other City Departments and the Corporation (the City of Chicago itself) (the Law Department clients) also supports the argument for this specialized and highly customized software that has to be exclusive and secured from not only from within the various divisions of the department but also from the various departmental clients. The ethical "walls" of Attorney Client Privilege.
  
- The Mitratesch software is modular, loosely coupled and web-based and conforms to the current City of Chicago BIS technology standards which allows the Law Department to further customize the software based on user and division requirements and needs. It enables the department to interface with various other city standard applications albeit without destroying the confidentiality of the attorney work product.
  
- Because the Mitratesch software allows for customization based on functional and business requirements, and because the software platform is developed in the same platforms as the City of Chicago standard software platforms of Oracle, Java, Weblogic and Business Objects, it is the Law Department's understanding that the software can be integrated with current City of Chicago applications such

as FMPS, Groupwise, LexisNexis/Examen, Law Bulletin Court docketing, Cook County Circuit Court docket, Cook County Recorder of Deeds, Hansen, AHMS, IRIS.

In conclusion, the Law Department has spent several years evaluating and re-evaluating the market of the Legal Case Management Software. In its assessment, the Mitrtech software has proven to contain the most compatible, functional, business and technical components suited for the practice of the Law Department in the City of Chicago. Based on the Law Department's assessment, it is the "best fit" software for the Legal Case Management System.

Thank You.

## TeamConnect

- ▶ [Benefits & ROI](#)
- ▶ [Features](#)
- ▶ [Architecture](#)

### Datasheets

- ▶ [TeamConnect Legal Suite](#)
- ▶ [TeamConnect Legal Matter Management](#)
- ▶ [TeamConnect Legal Executive Dashboard](#)

Built on a foundation of open standards, TeamConnect Enterprise is a robust enterprise knowledge and process management platform which enables organizations to manage complex business processes



Involving multiple resources, documents, events, and business workflows.

TeamConnect Enterprise will help you connect teams, coordinate their work, and manage their collective knowledge throughout the enterprise. The result is unparalleled productivity increases, cycle time reduction, and resource savings across the organization.



### [Benefits & ROI](#)

In addition to the extensive business logic built into TeamConnect, one of its principal value propositions is the ability to configure the majority of the solution with business experts, rather than systems programming experts... [more](#)

### [Features & Functionality](#)

TeamConnect provides a multi-tier, object-oriented, browser-based enterprise software infrastructure for truly Web-enabled knowledge processing applications... [more](#)

### [Architecture](#)

Built on a foundation of open standards, TeamConnect Enterprise ensures the protection of your technology investment and provides maximum flexibility, choice, and interoperability... [more](#)

For more information on how TeamConnect Enterprise can help solve knowledge and process management challenges in your organization, please contact one of our representatives.





# TeamConnect

Back	Benefits	ROI
<p><b>Datasheets</b></p> <ul style="list-style-type: none"> <li>TeamConnect Legal Suite</li> <li>TeamConnect Legal Matter Management</li> <li>TeamConnect Legal Executive Dashboard</li> </ul>	<p><b>Platform agnostic and hardware independent</b>, TeamConnect Enterprise is supported on a variety of application and Web server platforms*, thus enabling IT to re-use existing resources, and minimize capital investment costs.</p>	Leverage Existing IT
	<p><b>A robust, scalable architecture</b>, the application serving environment is built on a foundation of open standards, leveraging J2EE and XML, and providing complete interoperability with existing and legacy systems.</p>	Interoperability, and
	<p><b>Graphic User Interfaces and other administrative tools</b> enable administrators to maintain configurations and modify business processes to reflect changing business requirements.</p>	Adaptive to Changing Requirements
	<p><b>Lower development and maintenance costs</b> beat our competition with fully-featured and fully-scalable products that can span a single department or a global enterprise.</p>	Low Cost of Owners
	<p><b>The flexibility and adaptability</b> of TeamConnect's functional architecture allows it to be used for multiple knowledge and process management applications in your enterprise, serving as a single application framework, and thereby eliminating information silos created by traditionally disparate systems.</p>	Inherently Integrated

# TeamConnect

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## Key Functional Areas

### Datasheets

- ▶ TeamConnect Legal Suite
- ▶ TeamConnect Legal Matter Management
- ▶ TeamConnect Legal Executive Dashboard

Document Management	Provides out-of-the-box document management functionality including versioning, check-in/check-out, and full text searching (Oracle deploy only). Integrates seamlessly with third party document management systems.
Financial Management	Provides comprehensive budget allocation and tracking functionality, targeting time, expenses, fees, and reserves, including invoice process addition, offers built-in business logic that can limit expenses or send when actual expenditures approach or exceed budgeted allocations.
Routing & Workflow	Provides workflow capability for the complete automation of business processes. Allows multiple levels of business logic and workflows, trigger various activities, including task assignments, approval requests, and automated actions (approvals, rejections, email alerts, etc.).
Rules Engine	Allows you to define your organization's practice specific business logic through an easy-to-use GUI, enabling TeamConnect Enterprise to automatically perform validations, security checks, and approval processes that control data flow and ensure a reliable and automated workflow system.
Customizable Homepages	Provides users with a completely customizable homepage, containing specific information such as upcoming tasks, appointments, important messages, links to corporate intranets, including external data such as quotes, news, weather etc. Enables quick access to relevant information and provides targeted menus relevant to the user or group.
Discussion Forums	Provide the unique means to group online discussion threads, enabling sharing between project members, while acting as an information repository for specific, common topics and full text searching capabilities.
Data Entry Wizards	Automates data collection and validation by leading the user through steps that define which information should be automatically filled in or ensuring a database of standardized and consistently populated records.
Integrated Security	Provides comprehensive security and rights management capabilities, granular control of access privileges for individual users, or for groups to the individual record level. Ensures the complete protection and security of confidential information, and enables access only to authorized users.
System	Provides comprehensive system and event logging capabilities using the

**Administration** for faster performance tuning and fault tracking. Includes comprehensive auditing capabilities, allowing extensive activity logging on a per user

**Enterprise Interoperability**

**Standards Based** A foundation of open standards (J2EE) ensures the protection of your investment and provides the maximum flexibility and choice.

**Enterprise Authentication** Provides a plug-in architecture, supporting numerous enterprise authentication mechanisms including LDAP, NTLM, and RSA. Allows users to login on access to multiple applications that normally require separate logins.

**Application Integration** TeamConnect's XML API provides a standard communication layer that corporate and external applications and data sources to link, providing interoperability with existing and legacy systems.

# TeamConnect

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## Architecture

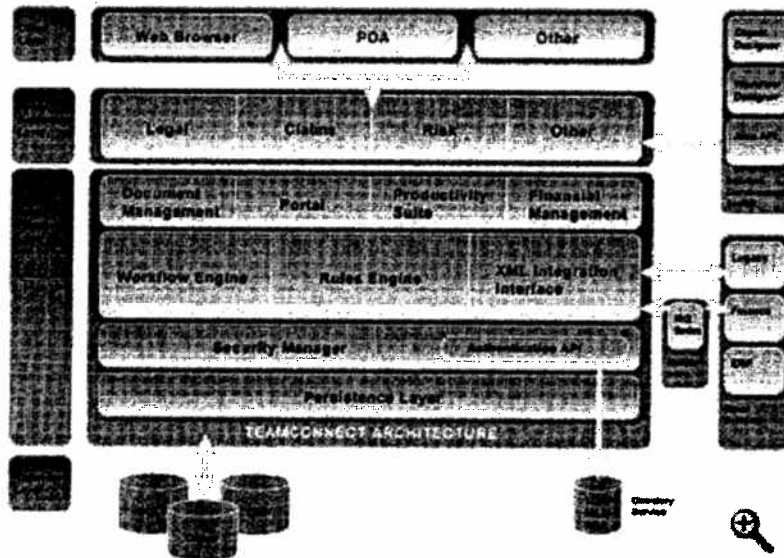
### Datasheet

▶ CLMS

▶ TeamConnect Advantage

TeamConnect's Web-based architecture provides a robust, scalable and secure application-serving environment capable of hosting multiple, integrated knowledge processing applications for various units of an organization. Leveraging SOAP and XML standards, TeamConnect delivers enterprise-class application flexibility, and supports Java 2 Platform Enterprise Edition (J2EE), making it ideal for large or mission critical applications.

The underlying architecture is fully object-oriented and enables seamless integration with external applications and legacy systems, through XML's open standards.



TeamConnect Enterprise architecture includes the following functionality:

### Mission Critical Capable

- ▶ Built-in Fault Tolerance
- ▶ Integrated Transaction Management
- ▶ Recoverable
- ▶ Application Data & Meta Data under Relational Control

### Scalable and Robust

- Multiple Transaction Servers
- Firewall Neutral, for simpler deployments
- Load Balancer Transparent

#### **Interoperable**

- J2EE Compliant
- XML Based Integration
- Supported on Multiple Platforms

#### **Security**

- Integrated ACL Based Security
- No Direct Access to Data or Meta Data
- Application Level User / Session Management
- Commercial Grade Transport Layer Encryption

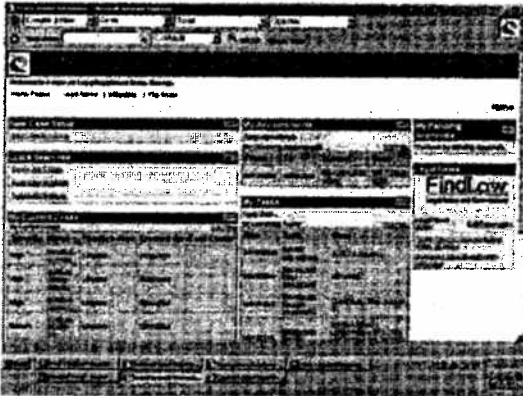


## TeamConnect® Legal Matter Management



### Take charge.

TeamConnect Matter Management provides an enterprise-wide view of critical information for the proactive management of litigation, compliance, and asset risk. Reduce legal costs, collaborate with internal departments, partner with outside counsel firms, and ensure compliance for the business-focused and results-oriented approach to the challenges facing legal departments.



With TeamConnect Legal, in-house counsel can keep track of all matters and be alerted to high exposure issues that need immediate attention.

#### Practice Areas

Litigation  
Labor & Employment  
Environmental  
Regulatory Compliance  
General Liability  
Contracts & Agreements  
Mergers & Acquisitions  
Intellectual Property  
Real Estate

#### Financial and Cost Management

Manage legal costs with a holistic approach – from litigation to liability exposure and ultimate bottom line results. More than just processing legal invoices, TeamConnect Legal Matter Management provides unprecedented control and accounting for company financials impacted by legal activities.

- Ensure 404 compliance through accurate, complete, and consistent accruals.
- Generate real-time accrual reports with the push of a button.
- Set matter budgets at the case, vendor, and expense or task-code level.
- Set matter budgets annually, quarterly, monthly, as desired.
- Roll up departmental matter budgets to overall legal spend summaries.
- Monitor cost allocations to between and among business units.
- Monitor spend as it relates to services.
- Monitor spend as it relates to liability exposure.
- Limit approval of expenditures if they exceed budgets.
- Consistently evaluate matters of similar type to determine assessment.
- Reduce legal fees by assigning the appropriate vendor based on prior experience to ensure good results.
- Send alerts when actual expenditures are near or exceed budgeted allocations.

"Mitratach's web-based technology presented us with an ideal solution for our environment. By standardizing on a completely browser-based system, we are able to seamlessly deploy the system to all of our operations globally."

Marianne Corr  
Vice-President and Deputy General Counsel  
Textron



## TeamConnect® Legal Matter Management



### Legal Business Intelligence

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View all of your essential information in real time, with the ability to “drill down” to specifics. Vital matter, risk and exposure metrics are available on Dashboards and Reports including:

Spend by matter category

Top 10 matters

Top 25 Outside Counsel Spending

Budget Summary

Budget vs. Expenditure Detail

Invoice Summary

Settlement Payout

Matter Count

Case Progress

Take proactive action against risks tracked at any level throughout the organization.

### Electronic Invoice Processing

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Traditional invoice approval processes are slow, inefficient, and error-prone. TeamConnect Legal Matter Management eliminates bottlenecks, providing a completely automated and configurable electronic invoice approval workflow.

- Accept electronic invoices from trading partners in numerous formats, including LEDES.
- Review, and make adjustments at the line item or fee / expense level.
- Perform automatic validation of vendors, timekeepers, and rates.
- Set approval limits for individual users and define when invoices should be escalated.
- Maintain a complete audit trail of the invoice workflow for auditing purposes.
- Trigger automatic payment processes when integrated with an Accounts Payable system.

### Outside Counsel Management

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Build a mutually beneficial relationship with outside counsel by collaborating on all phases of the engagement. Find the right attorney, use trusted resources, share documents securely, watch your legal spend and measure your results.

Maintain vendor profiles that include key information such as approved timekeepers, negotiated rates, areas of expertise, past performance, and current assignments. Standardize the selection process with a step-by-step approach that ensures that attorneys are equipped with the information they need to make informed hiring decisions, and avoid conflicts of interest.

Capture vendor performance on a case-by-case basis so you only hire the vendors that have successfully met department standards in the past.

### Automation

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Ensure consistency by automating routine tasks so that attorneys can focus on core activities.

- Data entry wizards enable matter information to be entered consistently and validated for accuracy.
- Built-in workflow automatically assigns matters and generates appropriate notifications and reminders.
- Invoices are routed electronically for approval by assigned managing attorneys
- Configurable to fit your organization's best practices.

### Industries

- Financial Services
- Pharmaceuticals
- Energy & Utilities
- Manufacturing
- Insurance
- Government
- Automotive
- Telecommunications
- Retail
- Healthcare



# TeamConnect® Legal Suite



## Get strategic.

Monitor your enterprise, evaluate performance, and take decisive action. Provide an unparalleled level of service to your enterprise with the matter-centric TeamConnect Legal Suite, the single platform solution for increased collaboration, legal business intelligence, and strategic decision-making.

Position TeamConnect Legal Suite at the center of your legal operations and realize the benefits of technology's promise. Empower your legal department with the Enterprise Risk Monitor for the proactive and strategic management of litigation, compliance, and asset risks.

### Visibility

Provides enterprise-wide monitoring of your critical data, facilitating strategic action and high-level decision-making.

With extended legal oversight, the TeamConnect Legal Suite's Executive Dashboard provides an analytical, collective view of trending data for financial accruals, product defect rates, security incidents, claims, customer complaints, fraud, and IP license infringement.

### Collaboration

Supports internal customers, in-house, and outside counsel in a mutually beneficial, collaborative relationship.

From documents to real-time matter status updates to electronic budget submission, approval, and beyond, TeamConnect Legal Suite supports the entire process of engagement.

- Collaborate with internal customers, business units, company executives, and outside counsel.
- Enhance internal and external communication and share best practices.
- Synchronize process workflows and align the interests of all business partners.

**"TeamConnect enables us to manage our outside counsel, improve employee productivity, and obtain greater visibility between departments."**

*Libby Troughton  
Chief Systems Specialist  
The Home Depot*

### TeamConnect Legal Suite Components

- Matter Management
- Mass Tort
- Claims Litigation
- Entity Management
- Incident Reporting and Investigation

### Flexibility

Offers the flexibility to grow with, adapt to, and perform according to your business requirements.

Configurable, scalable, and extensible, the TeamConnect Legal Suite is the most flexible legal solution addressing industry-specific and business-specific challenges, regulatory compliance issues, and future demands.

- Leverage our 18 years of legal domain expertise in industries such as: Financial Services, Energy & Utilities, Pharmaceutical, Manufacturing, and more.
- Benefit from a technology investment that evolves as your business drivers and competitive pressures change.
- Discover the only legal-centric solution with the flexibility to solve growing legal business concerns such as: Privacy, Security, Claims, Asset Management, and more.

### Integration

Enables seamless integration with external applications and legacy systems through XML's open standards.

- Integrate with departmental systems, such as Claims, Accounting, HR, CRM, and Manufacturing.
- Integrate with external vendors, such as outside counsel and litigation services.
- Integrate with corporate-wide document management systems and productivity suites.

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## TeamConnect® Legal Suite



### TeamConnect Legal Suite Components

#### Matter Management

Manages budgets, controls spend, ensures quality and optimal results through real-time collaboration and partnership on a single platform.

- Litigation
- Transactions
- Invoice workflow and Budgeting
- Outside Counsel Management
- Document Management and Reporting

#### Mass Tort

Provides comprehensive management of class action lawsuits for companies facing litigation in any of the following areas:

- Tobacco
- Asbestos
- Manufacturing
- Pharmaceutical

#### Claims Litigation

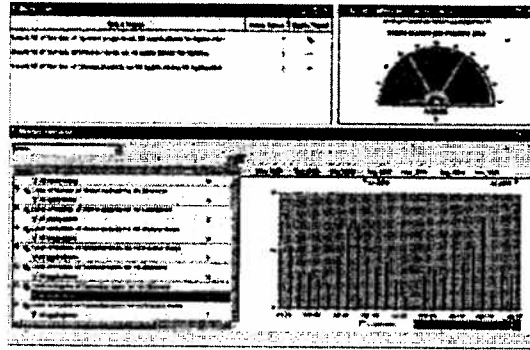
Manages litigates claims across multiple jurisdictions and throughout many regional offices.

- Health
- Worker's Compensation
- Property & Casualty
- Life
- Self-Insured

#### Entity Management

Manages corporate governance, compliance, and administrative needs in both public and private corporate enterprises.

- Legal Documentation for Companies and Subsidiaries
- Articles of Incorporation
- Personal Files and Records
- Meeting Records and Minutes



The Enterprise Risk Monitor enables the proactive and strategic management of litigation, compliance, and asset risks.

#### Incident Reporting and Investigation

Enables organizations to identify potential risks and take early corrective action by managing incidents, complaints, and other reports that increase corporate liability and financial risks.

- Corporate Security
- Customer Complaint Management
- Compliance

#### TeamConnect Legal Suite Features

- Resource Management
- Productivity Management
- Content Management
- Document Management
- Financial Management
- Event Management
- Reporting
- Dashboards
- Analytics and Trending



## TeamConnect<sup>®</sup> Legal Executive Dashboard



**You are at the controls.**

**Drive strategic action. Steer high-level decisions. Avoid unforeseen risks.**

Accurate, reliable, and insightful, TeamConnect Legal Executive Dashboard provides an enterprise-wide view of critical business, legal, and compliance data in summary tables, dynamic graphs, and metric monitors.

Do you know the facts about your enterprise performance?  
It's time you did.

Take the proactive role corporations are demanding  
from their legal departments.

Beyond the operational matter management system for attorneys and their staff, TeamConnect Legal Executive Dashboard helps General Counsel achieve strategic goals. Real-time information at your fingertips provides an analytical, collective view of trending data for financial accruals, product defect rates, security incidents, claims, customer complaints, fraud, and IP license infringement. Drill down for details, assess cases early, get the critical answers you need, and make informed decisions.

### Personalized

- Generate customized results based on user roles and benefit from a system that performs according to your business requirements.

### Perceptive

- Gain the real-time access to reports, charts, tables, graphs, and tickers that facilitate immediate responses to internal and external demands.

### Interactive

- Drill down for details and interact with generated results.

### Adaptable

- Modify your reporting criteria as your business drivers and competitive pressures change.

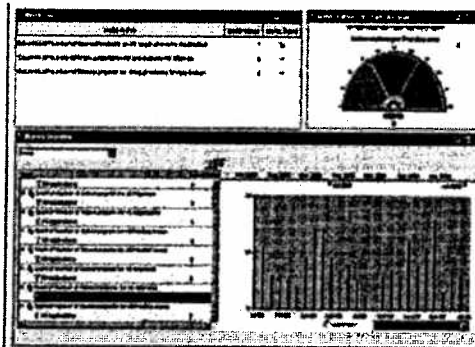


Figure 1: Link corporate strategy to key indicators.

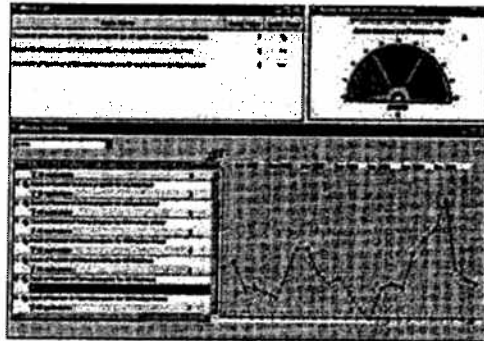


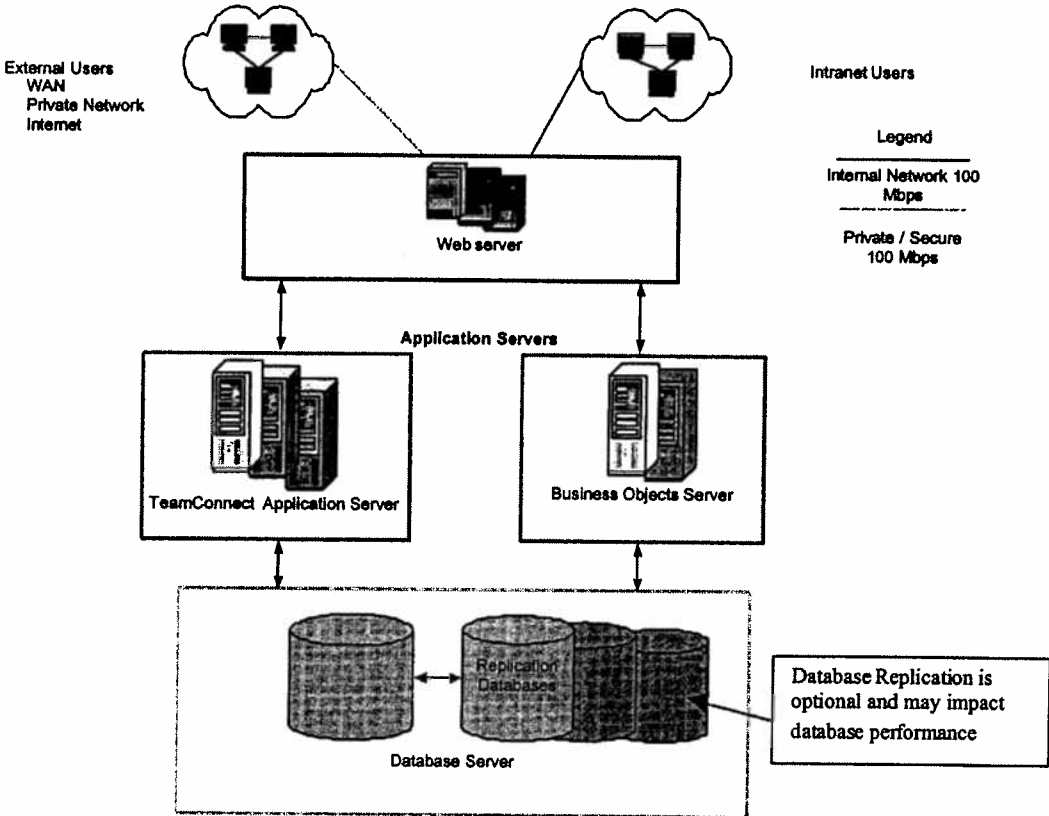
Figure 2: Gain real-time access to information.

4k.



# Minimum System Configuration

## 500 User Environment



**Clients**

Intel® Pentium® 4, AMD Athlon or Sun UltraSPARC IIe, III or IIII

256 MB RAM or higher

16 bit color video setting or better

Operating Systems:  
Windows 9X, 2000, XP, Linux, Solaris

Web Browsers:  
Internet Explorer 5 or higher, Netscape 6 or higher, Mozilla 1.3

**Web Servers**

Intel® Pentium® 4, AMD Athlon, Sun UltraSPARC II or III

1 GB RAM or higher

16 bit color video setting or better

Operating Systems:  
Windows 2000, Solaris 8 or 9

Web Servers:  
IIS 5, Apache, iPlanet, WebLogic

**Application Server**

Quad Intel® Xeon, or Quad Sun UltraSPARC III

4 GB RAM or higher per processor

Operating Systems:  
Windows 2000, Sun Solaris

Application Servers:  
WebLogic, iPlanet, WebSphere

**Database Server**

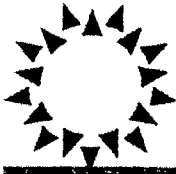
Quad Intel® Xeon, or dual Sun UltraSPARC III

4 GB RAM or higher

Operating Systems:  
All supported by Oracle, MS SQL & DB2

Relational Databases:  
Oracle 8i and 9i  
MS SQL 7  
DB2 7

Sun/Oracle combinations are recommended for the database tier



**MITRATECH**

Connecting People, Knowledge and Process

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## TeamConnect 2.2 SP1 Certification List

### Application Servers

- WebLogic Express 7.0.6 - City Standard
- WebLogic Express 8.1 SP4
- WebSphere 5.0.2 SP7
- WebSphere Express 5.1.0
- WebSphere Express 6.0.0.1

### Database Servers

- Oracle 9.2.0.4.0
- Oracle 10G (10.1.0.3.0) - City Standard
- SQL Server 2000 SP3

### Browser

- Internet Explorer 6.0 SP1 - City Standard
- Netscape Navigator 7.1

### Business Objects

- Business Objects 5.1
- Business Objects 6.5 - City Standard

As of 5/05

## Company History



Committed to quality, service, and innovation, Mitratach has demonstrated a keen awareness of legal business drivers, industry trends, and market demands. Since 1987, Mitratach has provided tangible business value to clients with best-in-class technology.

Some key milestones in Mitratach history include:

### 2005

Mitratach announces TeamConnect Legal Suite, a comprehensive set of software solutions that includes Matter Management, Executive Dashboard, Entity Management, Mass Tort, Incident Reporting and Investigation, to maximize legal department productivity while reducing operations and IT costs.

### 2004

Mitratach launches TeamConnect Legal to extend legal domain expertise to small and midsize legal departments. Mitratach also announces support for IBM eServer zSeries and relocates headquarters to accommodate growth.

### 2003

TeamConnect Enterprise integrates with IBM's WebSphere Application Server and Bea WebLogic Platform to provide a highly secure, scalable, and reliable environment. Mitratach appoints Afshin Behnia President and CEO. Afshin Behnia was the key architect of product strategy, sales, and partner channel expansions.

### 2002

Mitratach releases TeamConnect Enterprise 2.0, extending the company's expertise into the realm of fully Web-enabled, J2EE compliant, XML based application services.

### 2001

Mitratach establishes a formal alliance with Deloitte & Touche and releases Loss Control and Comparative Negligence Assessment applications.

### 2000

Mitratach establishes a partnership with BusinessObjects, embedding BusinessObjects reporting and data mining solutions in TeamConnect Enterprise.

### 1999

4N.

Mitratach releases TeamConnect Enterprise 1.0, a completely new application designed and developed from the ground up to be a fully Web-based business process management solution embracing open standards. A key innovation introduced together with TeamConnect Enterprise, is the Rapid Solution Development toolset.

**1996**

Mitratach releases CLMS Version 5 and TeamConnect for CLMS, the first Web-based application for case management in the legal industry. TeamConnect for CLMS extends CLMS capabilities, enabling outside counsel to collaborate with legal departments through the Web.

**1994**

Mitratach releases CLMS Version 3.5, implementing the Client/Server computing model under Windows 3.1. Mitratach also forms an alliance with AT&T GIS for clients such as Farmers Insurance, Home Savings, Allstate, & Dow Corning.

**1993**

Mitratach releases CLMS for Microsoft Windows. Mitratach targets corporate legal and insurance markets with clients such as Coca Cola, Bristol Meyers, Employment Health Insurance, CNA Insurance.

**1992**

Mitratach releases the Corporate Legal Management System (CLMS), Version 1 on personal computers and networks, and establishes marketing alliances with Prentice Hall, Simon & Schuster, and Paramount.

**1987**

Mitratach releases PI Expert, providing litigation support, on personal computers, for both plaintiff and defense law firms specializing in personal injury.

# DPS PROJECT CHECKLIST

For DPS Use Only	
Date Received	
Date Returned	
Date Accepted	
CA/CN's Name	

**IMPORTANT:** PLEASE READ AND FOLLOW THE INSTRUCTIONS FOR COMPLETING THE PROJECT CHECKLIST AND CONTACT THE APPROPRIATE UNIT MANAGER IF YOU HAVE ANY FURTHER QUESTIONS. ALL INFORMATION SHOULD BE COMPLETED, ATTACH ALL REQUIRED MATERIALS AND SUBMIT FOR HANDLING TO THE DEPARTMENT OF PROCUREMENT SERVICES, ROOM 403, CITY HALL, 121 N. LASALLE STREET, CHICAGO, ILLINOIS 60602.

**GENERAL INFORMATION:**

**Date:** 05/24/2006  
**REQ No.:** 27889  
**Contact Person:** Rajeev Kumar  
**Tel:** 744.0135 **Fax:** 742.0664 **E-mail:** LW00999@cityofchicago.org  
**Project Manager:** Rajeev Kumar  
**Tel:** 744.0135 **Fax:** 742.0664 **E-mail:** LW00999@cityofchicago.org  
**PO No.:** (if known):  
**Modification No.:** (if known):  
**Previous PO No.:** (if known):  
**Project Description:** Law Department Case Management System

**FUNDING:**

City:  Corporate  Bond  Enterprise  Grant\*  Other  
 State:  IDOT/Transit  IDOT/Highway  Grant\*  Other  
 Federal:  FHWA  FTA  FAA  Grant\*  Other

LINE	FY	FUND	DEPT	ORGN	APPR	ACTV	OBJT	PROJECT	RPTG	\$ DOLLAR AMOUNT
†1	005	0483	031	2005	3012	220000	0000	48011031	0000	\$725,000
†2	008	0100	031	2005	0154	220154	0000	00000000	0000	\$159,500
†2	009	0100	031	2005	0154	220154	0000	00000000	0000	\$159,500
†2	010	0100	031	2005	0154	220254	0000	00000000	0000	\$159,500

†1 Funding originated from Bond Funds

Estimated Value \$

\*IF GRANT FUNDED, A COPY OF THE APPROVED GRANT AND APPLICATION ARE REQUIRED and any other Terms and Conditions that may apply.

†2 Funding contingent upon future OBM allotments; presumably Corporate Funds

**SCOPE STATEMENT:**

Attached is a Detailed Scope of Services and/or Specification

**IMPORTANT:** THIS IS A CRITICAL PORTION OF YOUR SUBMITTAL. IN ORDER FOR DPS TO ACCEPT YOUR SUBMITTAL YOU MUST COMPLETE THE SPECIFIC SCOPE REQUIREMENTS AS SET FORTH IN THE SUPPLEMENTAL CHECKLIST FOR THAT UNIT.

The following is a general description of what should be included in a Scope of Services or Specification:

A clear description of all anticipated services and products, including: time frame for completion, special qualifications of prospective vendors, special requirements or needs of the project, locations, anticipated participating user departments, citation of any applicable City ordinance or state/federal regulation or statute.

**TYPE OF PROCUREMENT REQUESTED (check all that apply):**

**NEW REQUEST**

Blanket Agreement  
 Standard Agreement  
 Small Orders

**MOD/AMENDMENT**

Time Extension  
 Vendor Limit Increase  
 Scope Change/Price Increase/Additional Line Item(s)  
 Other (specify):

**FORMS:**  Requisition  Special Approvals  Non-Competitive Review Board (NCRB)

**CONTRACT TERM:** Requested Term (number of months):

**PRE BID/SUBMITTAL REQUIREMENTS:**

Requesting Pre Bid/Submittal Conference?  Yes  No Requesting Site Visit?  Yes  No



# DEPARTMENT OF LAW

# MEMORANDUM

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**Subject:** Law Department Case Management System  
Software Purchase & Maintenance Agreement

**To:** Claude Humphrey  
Carol Simbler, Assistant to the Commissioner

**EC:** Rajeev Kumar, Director of Information Technology

**From:** Patrick J. Ryan, Director of Administration

**Date:** Wednesday, May 24, 2006

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The Law Department respectfully requests to appear before the Sole Source Review Board for consideration to enter into negotiations with Mitratech Holdings, Inc. of Los Angeles, California. The purpose of such negotiations is for the purchase and annual maintenance of TeamConnect Enterprise software, which we are recommending as the Law Department Case Management application software. I have attached the following documents to facilitate this review.

- Project Checklist (attachment 1)
- Justification for Non-Competitive Procurement (attachment 2)
- Justification Narrative/Pricing Structure (attachment 3)
- Product Information/Configurations (attachment 4)
- Requisition #27889 (attachment 5)

A hard copy of this information has been forwarded to your attention.

We request that we appear before the June 2006 Sole Source Board meeting. Please contact Rajeev Kumar at 744.0135 for any specific information regarding the proposed vendor or meeting attendance. I may be reached at 744.7375 to answer any general questions you may have or to help facilitate this process as needed.





**Department of Law**

# MEMORANDUM

**TO:** Barbara Lumpkin  
Chief Procurement Officer

**FROM:** Mara S. Georges *msy*  
Corporation Counsel

**DATE:** May 26, 2006

**RE:** Department of Law  
Legal Case Management Solution

Attached is a copy of the Department of Law's request for approval for a non-competitive procurement for the legal case management software. Also, I have attached the Task Order Request for the implementation of that software.

Please provide me with the next steps necessary in this process.

If you have any question or need further information, do not hesitate to contact Jim Dunn at 744-1558 or [jamesdunn@cityofchicago.org](mailto:jamesdunn@cityofchicago.org)