

Morgan Maguire

From: Morgan Maguire
Sent: May 18, 2017 10:31 AM
To: 'Anil Vaghela'
Cc: Devaang Bhatt; Hiren Patel; Ryan Knuth; 'Sarah Christie'; 'mgoodacre@industrialagency.ca'
Subject: RE: P3 Document Set
Attachments: P3 Prototype Master List.xlsx

Hi Anil,

I've looped Industrial into this email chain, because I think the questions you're asking will relate to the overall design of the product. The existing P3 prototype and Agreement Navigator are meant to be illustrative of the application we'd like to build, but I'd like the Industrial team to take a fresh look at how we design the application in a new environment. Therefore, let's avoid diving into the source code for the existing prototype, because I think it will be a distraction from the overall vision for the project.

I believe all the documents flagged for the P3 prototype have been OCR'd. However, we need to have a discussion on how we're going to integrate the documents into the system. Are we going to manually XML code the documents with an updated schema customized for the new application, or are we going to develop tools that automate the process and allow admin users to interact more effectively with PDF/Word documents? Ryan and I had a discussion about this yesterday, and I think it would be worthwhile to do some R&D on creating an application that automatically converts PDF/Word documents into a format that allows admin users to interact directly with the document and add relevant value added content. I'm not sure if this would mean creating an application that automatically generates XML code, or displays the PDF/Word documents directly in HTML.

Other companies are already doing similar things:

Casetext's CARA allows users to upload PDF/Word documents to the system, which are then automatically subject to analysis. The analysis is algorithmic, but the principle is similar to what we would want to achieve with subject matter experts doing the analysis: <https://www.youtube.com/watch?v=bbg04oAkenE>

Google Translate has a function that allows users to upload PDF/Word documents, which are automatically processed, translated and displayed in HTML format: <https://translate.google.ca>

Thoughtly's Ellipse allows users to upload large datasets of the PDF/Word documents which are subject to automated algorithmic analysis and displays analytics on the data contained in the documents: <https://thoughtly.co/ellipse/>

The common thread among these products is that they allow users to seamlessly upload PDF/Word documents, and then instantaneous allow users to directly interact with the documents. If we could create a similar application within the P3 prototype (and eventually extend it to ISLG) this would greatly improve the efficiency of our data capture process, and increase our ability to scale the document collection when we get past the prototype stage.

These are big issues that warrant a group discussion. Megan is away on holiday for the remainder of the month, but let's schedule a call with everyone at the beginning of next month. Perhaps the week of June 5-9? In the meantime, please circulated any feedback on Basecamp (I'll post this discussion), and do any research necessary to prepare and provide suggested solutions for these issues.

Finally, I see Hiren Patel is cc'd. Is he the new senior developer joining the team? If so, welcome Hiren! Sarah, when Anil or Devaang confirm, could you please ensure he is added to the Basecamp P3 project.

Thanks,

Morgan

Morgan D. Maguire, J.D.

Chief Executive Officer

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From: Anil Vaghela [mailto:Anil.Vaghela@devitpl.com]
Sent: May 18, 2017 5:40 AM
To: Morgan Maguire <mmaguire@investorstatelawguide.com>
Cc: Devaang Bhatt <Devaang.Bhatt@devitpl.com>; Hiren Patel <Hiren.Patel@devitpl.com>
Subject: RE: P3 Document Set

Hello Morgan,

One more question:

Please advise if we need to perform OCR programmatically for pdf files.

Regards,

Anil Vaghela | Team Lead

From: Anil Vaghela
Sent: 18 May 2017 18:08
To: 'Morgan Maguire' <mmaguire@investorstatelawguide.com>
Cc: Devaang Bhatt <Devaang.Bhatt@devitpl.com>; Hiren Patel <Hiren.Patel@devitpl.com>
Subject: RE: P3 Document Set

Hello Morgan,

We have reviewed excel file and Agreement Navigator function on p3lg.

I assume that we need to extend below mentioned functionality in the same p3lg application. If yes then please provide us application source code for the p3lg project.

There are 3 tabs in the excel file. We assume that we need to filter documents using "issues" provided in 3rd tab. Please clarify.

Questions:

Do we require to highlight texts in the pdf files or just need to open the files in pdf viewers so that user can compare these files?

We are still analysing the tool and will be back with more questions.

Regards,
Anil Vaghela | Team Lead

From: Morgan Maguire [<mailto:mmaguire@investorstatelawguide.com>]
Sent: 16 May 2017 21:36
To: Devaang Bhatt <Devaang.Bhatt@devitpl.com>; Anil Vaghela <Anil.Vaghela@devitpl.com>
Subject: RE: P3 Document Set

Hello Devaang and Anil,

Following up on my email from last week. Let me know if you have any questions about the proposed document collection, and how we will proceed with creating the schema for coding the documents for the prototype. Perhaps we can schedule a call for next Tuesday at 8:30pm Vancouver time for a progress report.

Thanks,

Morgan

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From: Morgan Maguire
Sent: May 11, 2017 11:55 AM
To: 'Devaang Bhatt' <Devaang.Bhatt@devitpl.com>; Anil Vaghela <Anil.Vaghela@devitpl.com>
Subject: P3 Document Set

Hi Devaang,

Further to our discussion last night, attached is the spreadsheet that I was referring to that outlines the document set that we'll be working with for the P3 prototype. You'll see there are three tabs. The first tab provides an overview of the nine projects that will be focused on for the prototype, which include general information about the projects that we'll integrate into the prototype. The second tab provides a list of all the applicable documents for each project. Column N indicates whether a document may require coding for the final version of the P3 product. Column O indicates documents that have been flagged for coding for the P3 prototype, which will focus on a narrow set of issues outlined under the third tab. For the purposes of the prototype, we'll focus on coding the Column O documents. Copies of the documents can be view/downloaded through the links under column K.

Also, here are the details for accessing the old P3 prototype:

- (i) initial USER/PASS to get past initial login (this blocks search engines) to get to the website for P3LawGuide
User: islg_developer

Pass: 6DBHT8zH23nS

Additional credentials:

(ii) Login as P3 sample site member:

<http://p3lg.tologix.com> (click button in top corner) as normal site user:

User: P3LGdemo

Pass: P3LG2010

(iii) Admin User

<http://p3lg.tologix.com/admin/adminlogin>

User: P3LGdemo

Pass: P3LG2010

This version of the prototype exists on the Boxfabric server, which could be shutdown at any moment. Another version is backed-up locally, and can be restored if necessary on a Carbon60 server. As I described during our call, the prototype is essentially a clone of ISLG with the addition of the Agreement Navigator research tool:

<http://p3lg.tologix.com/ResearchTools/AgreementNavigator?toc=content&id=262&tab=r>. This tool best illustrates the type of tool we want to create, which will allow the user to filter documents and compare/contrast sections within the documents depending on certain parameters.

Let me know if you have any questions.

Morgan

Morgan D. Maguire, J.D.

Chief Executive Officer

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