

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:
Bid Receiving - PWGSC / Réception des soumissions -
TPSGC
Place du Portage, Phase III
Core 0A1/Noyau 0A1
11 Laurier St./11, rue Laurier
Gatineau
Québec
K1A 0S5
Bid Fax: (819) 997-9776

SOLICITATION AMENDMENT
MODIFICATION DE L'INVITATION

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

Comments - Commentaires

Vendor/Firm Name and Address
Raison sociale et adresse du
fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution
Shared Systems Division (XL)/Division des systèmes
partagés (XL)
4C1, Place du Portage Phase III
11 Laurier St./11, rue Laurier
Gatineau
Québec
K1A 0S5

Title - Sujet Case Management Software Solution	
Solicitation No. - N° de l'invitation EN578-130092/B	Amendment No. - N° modif. 006
Client Reference No. - N° de référence du client 20130092	Date 2013-04-25
GETS Reference No. - N° de référence de SEAG PW-\$\$XL-123-25647	
File No. - N° de dossier 123xl.EN578-130092	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2013-05-15	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Jalbert, Denise	Buyer Id - Id de l'acheteur 123xl
Telephone No. - N° de téléphone (819) 956-1083 ()	FAX No. - N° de FAX (819) 953-3703
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

Instructions: See Herein

Instructions: Voir aux présentes

Delivery Required - Livraison exigée	Delivery Offered - Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

The bid solicitation amendment # 006 is issued to provide answers to questions raised by the Industry;

Question 135

Reference: Annex C - Statement of Requirements, Section M-5 - Customer and Stakeholders Management Requirements, Mandatory Requirement M-5.1 states: "The CMSS must deliver, enable and support out-of-the-box customer and stakeholder management profile UI templates. Configuration of a customer and of a stakeholder profile must allow the inclusion of additional data elements as required by each BU to meet their individual information needs."

Question: Our solution includes a complete forms and template development environment that allows customer and stakeholder management profile UI templates to be quickly and easily constructed with configurable fields. Please confirm that the ability to construct UI templates complies with mandatory requirement M-5.1.

Answer: A development environment by itself is not sufficient. The proposed solution must provide, at a minimum, a basic initial customer and stakeholder management profile UI template that can be modified and configured as required by each BU to meet their individual information needs.

Question 136

Reference: Annex C - Statement of Requirements, Mandatory Requirements, Section M-7 - Event Management Requirements (Mandatory Requirements M-7.1 to M-7.10)

Question: The requirements for Event Management in section M-7 of Annex C are prohibitively restrictive. Their inclusion as a mandatory requirement in a case management solution will drastically reduce the number of vendors who can submit a compliant response. Please consider removing the requirements in section M7 of Annex C.

Answer: Canada has reviewed the request and the requirements remain the same. The calendaring and event management functionalities can be provided by third-party software that are fully and seamlessly integrated into the proposed CMSS.

Question 137

Reference: Form 5 - Software Publisher Authorization Form

Question: Please confirm that if we offer software licenses in which we are not the Software

Publisher, then that Software Publisher has to agree to the same mandatory RFP Terms and Conditions as stated in Part 7 – Resulting Contract Clauses. This appears to be the Crown's position in Form 5 as follows: "This confirms that the Software Publisher identified below has authorized the Bidder named below to license its proprietary products under any contract resulting from the bid solicitation identified below". Therefore RFP Contract Terms shall flow down to all Software Publishers.

Answer: The Bidder must ensure that any software publisher (subcontractor) are bound by conditions compatible with and, not less favourable to Canada than the conditions of Part 7 - Resulting Contract Clauses that applies to the deliverables that will be provided by the software publisher as sub-contractor. The successful Bidder (Contractor) is responsible for performing the Contract.

Question 138

Reference: Form 5 - Software Publisher Authorization Form

Question: It is our understanding that should third party software be required to meet the requirements of the RFP at bid closing or throughout the Contract period and its option years, that these Software Publishers are required to agree to the Terms & Conditions as stated in Part 7 – Resulting Contract Clauses without amendment.

Answer: The Software Publisher must authorize the Bidder to license its proprietary software products under the terms and conditions of any contract resulting from the bid solicitation.

Question 139

Reference: Annex C - Statement of Requirements

Question: From our extensive experience, modern Case Management systems require the use of mobile capability including remote offline processing of cases in areas such as Inspections, etc. This capability has been identified in many recent PWGSC and GOC RFIs and we are unsure why this is no longer a GOC Case Management requirement. Can you please explain why this is not a Requirement?

Answer: The statement is incorrect. Bidders should refer to Rated Requirement # R-8.2.

Question 140

Reference: Question and Answer # 060 and Annexe D - Canada Technical Environment

Question: In reference to Question and Answer # 060, please explain how departments who

are not currently running MS Outlook as their email client are to operate the CMSS. Annex D paragraph 2.2.2 indicates the CMSS must support various email systems.

Answer: The CMSS must meet the requirements as stated in Appendix C - Statement of Requirements. Canada may integrate the CMSS with other email systems at its discretion. Canada is requesting integration of the proposed CMSS with Exchange 2003 and Outlook 2003 SP2 or higher.

Question 141

Reference: Annex C - Statement of Requirements

Question: Please confirm if the CMSS is to remain fully functional should an unexpected outage occur in the email system. For example, the departmental or corporate email system experiences a short or long term outage. Should the CMSS provide full Case Management functionality which would allow the CMSS users to enter case data, manage case stages, store documents, manage workflows, manage customers & stakeholders, manage events, view reports & dashboards, etc.

Answer: No.

Question 142

Reference: Part 3 - Bid Preparation Instructions, Article 3.1 (d) - Submission of Only One Bid from a Bidding Group

Question: In response to Clarification Question 014, please explain how "Canada will choose at its discretion which bid will be considered". Please clearly explain the criteria to ensure bidders remain compliant and offer the best solution to Canada ?

Answer: As an exemple, if the same bidder or bidding group has submitted two bid responses, and assuming the responses are ranking in first and second place, Canada will choose at its discretion which bid will be considered.

Question 143

Reference: Article 7.19 - Maintenance and Support Services

Question: In response to Clarification Question 019, as there are no detailed upgrade requirements in the RFP, can Industry Canada and PWGSC explain how they envision the upgrade process required by the bidder? Traditionally, upgrades involve productivity enhancements which could affect interfaces and functionality changes which could affect each Business Unit (BU). How will this process be managed by Canada? How will this

process be coordinated as there will be multiple BUs as clients? Who will make the determination when the upgrade will occur not to disrupt any BUs?

Answer: As stated in Article 7.9 (b), the Technical Authority is the representative of Canada and is responsible for all matters concerning the technical content of the Work under the Contract. Canada will apply upgrades to the base configuration in coordination with the various Clients and pursuant to Canada's operating standards and requirements.

Question 144

Reference: 4003 (2010-08-16), Supplemental General Conditions - Licensed Software

Question: Will PWGSC agree to exclude the following provisions from SACC 4003 Supplemental General Conditions – Licensed Software: Sections 4, 5, 6, 9.2, 9.4, 14, 15 and 17?

Answer: No. Canada has reviewed the request and the requirement remains the same. Canada is acquiring the rights to use and to access the software products that comprise the Case Management Software Solution including the Warranty and the Documentation. These rights have been stipulated in Part 7 - Resulting Contract Clauses.

Question 145

Reference: 4004 (2010-08-16), Supplemental General Conditions - Maintenance and Support Services for Licensed Software

Question: Will PWGSC agree to exclude the following provision from SACC 4004 (2010-08-16), Supplemental General Conditions – Software Maintenance and Support Services for Licensed Software: Section 2?

Answer: No. Canada has reviewed the request and the requirement remains the same. As requested, the Bidders should demonstrate in their proposed support plan what are the measure in place to ensure that the requirement will be met.

Question 146

Reference: 2030 (2012-11-19), General Conditions - Higher Complexity - Goods

Question: Is PWGSC willing to replace SACC 2030 General Conditions - Higher Complexity - Goods with SACC 2010A General Conditions - Medium Complexity Goods, and then from 2010A, to exclude the following Sections : 9, 16, and 18?

Answer: No. Canada has reviewed the request and the requirement remains the same. Canada is acquiring goods that require the successful bidder to provide services in order that the goods is delivered, installed, tested and deployed within Canada's technical environments as a result of bid solicitation. The terms included in SACC 2010A do not address the complete scope of the goods and services that will be acquired as a result of this bid solicitation.

Question 147

Reference: 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services

Question: Is PWGSC willing to exclude SACC 4002?

Answer: Yes.

Question 148

Reference: Part 4 - Evaluation Procedures and Basis of Section, Article 4.7 - Usability Testing

Question: In response to Clarification Question # 053, to allow bidders to better understand the Testers background, could Canada specify by Tester and by Product, each person's experience in: (1) MS Outlook, (2) MS Office, (3) MS Dynamics, (4) WordPerfect, (5) Siebel, (6) CRM, (7) Salesforce.com, (8) SAP, (9) PeopleSoft, (10) Adobe Flash, (11) Cognos, (12) Lotus Notes, and (13) GroupWise.

Answer: All Testers have experience with MS Outlook and MS Office as interaction with these software products are required to perform the scenarios established in Appendix 2 - Usability Testing Evaluation Criteria.

Question 149

Reference: Annex C - Statement of Requirements, Section 1.2 - Objectives and Goals states: "Within Canada, numerous federal entities or Business Units (a business unit can be a branch, a sector, a directorate or a division for example) have identified a need for a Case Management Software Solution to assist the Government of Canada in better meeting its daily managerial and operation requirements. While the business units have widely differing applications characteristics, they all share common requirements. The general requirements revolve around the following business needs: (1) Ability to record and manage customer or stakeholder interactions, and to share this information within their business unit in a controlled manner. (2) Ability to manage issues and activities in a more accessible and collaborative manner, where all business unit members can access records of these issues

and activities from a single source, contribute to these records, and at some point close the issue or activity based on user roles and privileges. (3) Ability to attach and manage documents associated with a customer or stakeholder, a case and an event for the purpose of ensuring that all related information is easily accessible to the user when needed. The implementation of the Case Management Software Solution should provide document management functional capabilities while allowing the repository in which documents are stored to be GC standard repositories for all documents and media (i.e. GC Docs, RDIMS). (4) In addition to building a repository of customers and stakeholders and issues and activities they are involved in, business units need strong analytical capabilities to report and summarize these issues and activities into meaningful managerial and operational reports and analysis.

Question: In response to Clarification Question 079, to further clarify Mandatory Requirements M-1.1 and M-1.2 from Appendix C state: M-1.1 The CMSS must allow the Government of Canada to achieve the purpose, objectives and goals detailed in section 1. M-1.2 The CMSS must deliver, enable and support a working and complete licensed solution, which must include all components that contribute to the composition of a whole and in part(s) of the CMSS. A complete list must be provided identifying the names and versions of each licensed software component delivered as part of the proposed CMSS including mandatory function that each component supports. *The goals and objectives in Section 1 (as per the Mandatory requirement M1.1 require that "The CMSS must allow Technical Users to build business solutions for different Business Units that may include, but are not limited to, Contracts and Grants Management (outreach, application, eligibility, administration, management, audit and evaluation, monitoring and reporting); Courts/Judicial Management (registration, intake/ identification, knowledge base, scheduling, appeals management, issues management, monitoring, and case tracking); Compliance Management (registration, intake/identification, monitoring, occurrence management, inspections, licensing, certification and reporting); Entitlement Case Management (intake, eligibility, case workflow, entitlement calculation, contract management, monitoring and payment); Client Service (communication, service initiation, contact centre, knowledge base, sales, channel management, inquiries, case tracking); Investigations (communications, correspondence, scheduling, monitoring and reporting) and any other context that Canada sees fit."* This seems to indicate that the CMSS should include all software modules to meet the above requirements. No additional software or add-ons modules will be able to be procured to meet the requirements only Professional Services will be acquired through a competitive process to integrate and to configure the licensed software. For example if there is a commercially available add-on to meet specific requirements(ie: grants management) and it is not contained within this RFP bid, Canada will not be able to purchase it and use it for case management under this purchasing vehicle and will have to use separate competitive purchasing process.

Answer: The content of the answer to Question # 079 refers to Article 1.2 of Part 1 - General Information, Article 1.2 - Summary which is part of the Terms and Conditions of the bid solicitation.

The assumption made by the Bidder is based on wrong information. The Goals and Objectives of the Annex C - Statement of Requirements to meet the purpose, objectives, and

goals of M-1.1 are restated above as part of the Reference. The proposed CMSS should include all software modules to provide a flexible and configurable COTS platform from which Canada can quickly configure and deliver numerous business unit solutions, many of which are yet to be defined. If Canada has a requirement for specific case management functionalities outside the scope of Annex C - Statement of Requirements, Canada will use a separate acquisition process.

Question 150

Reference: Part 7 - Resulting Contract Clauses, Section 7.21 - Training, Paragraph (e) states: "The training must be provided within the National Capital Region and at other locations across Canada, as specified in the issued task authorization(s)."

Question: It is our assumption that "location" information in the task authorization will include the classroom building, room, address, city, province where the training is to be conducted and that the classroom will be provided by Canada. Please confirm.

Answer: Canada has identified two scenarios for the training which could be requested through the task authorization process. Bidders must provide per diem rates for these two scenarios in their financial bid.

**** Trainer at Canada Supplied Environment:** The Contractor must ensure that each of Canada's Users has been fully trained on all the functionality included in the Licensed Software associated with his/her field of duties and is in accordance with the approved Training Plan. The prices must be based on Canada providing facilities within the National Capital Region and the Contractor providing course materials, workbooks, instructor, and software.

**** Trainer at Contractor Supplied Environment:** The Contractor must ensure that each of Canada's Users has been fully trained on all the functionality included in the Licensed Software associated with his/her duties and is in accordance with the approved Training Plan. The prices must be based on Contractor providing facilities within National Capital Region, course materials, workbooks, instructor, and software.

Question 151

Reference: Annex A - Pricing Tables

Question: Please distribute the Excel price sheet containing pricing (Table 1, Table 2, Table 3, Table 4).

Answer: Annex A is not available in Excel Format

Question 152

Reference: Part 4 - Evaluation Procedures and Selection Methodology, Section 4.5 - Financial Evaluation, Paragraph (b), Line 7

Question: Please confirm which time-period in Columns 1, 2, 3 and 4 will be evaluated.

Answer: As per Table 3, Column 1 is 24hrs/day - 7 days/week; Column 2 is 16 hrs/day - 06h00to 22h00 - 7 days/week; Column 3 is 16 hrs/day - 06h00 to 22h00 - 5 days/week; and, Column 4 is 12 hrs/day - 06h00 to 18h00 - 5 days/week.

Question 153

Reference: Annex C - Statement of Requirements

Question: In relation to mandatory requirements M-3.1, M-3.2, M-3.3 and M-3.4, most government departments that have implemented Mykey put an Entrust Truepass server (<http://www.entrust.com/internet-security-software/specs.htm>) in front of the web application to handle the authentication and Entrust credential and then modify the application to map the user's DN and MBUN to an account. This can be used in conjunction with another Entrust Product called GetAccess that can map that credential to an LDAP or Active Directory account. Without the addition of these products, bidders may be forced into adding significant costs to the CMSS solution for security products that can be used for many applications besides CMSS, thereby inflating the cost of the CMSS to the Crown. Would the Crown please add Entrust Truepass and Entrust GetAccess to the supporting software list in Annex D – Canada Technical Environment in order to facilitate the CMSS to leverage these products' capabilities with their proposed solution?

Answer: The myKEY LOGIN service (referred to in M-3.10, M-3.11, M-3.12, M-3.13) is an implementation of Entrust Truepass and the proposed solution must integrate with it. Canada will provide the Entrust Truepass Session Validation Module software, after contract award, in order to complete this integration. The Entrust TruePass Session Validation Module is a Web server plug-in or filter that acts as the gatekeeper to protected web resources. It is installed on Web server and provides services such as session cookie issuance upon logon, and cookie renewal at configurable times. Canada is not specifying GetAccess as required software as there are many SAML based products available at varying costs, and each solution is open to use any of these products.

Question 154

Reference: Part 3 – Bid Preparation Instructions, Article 3.3 - Section II: Management Bid, Paragraph (c) - Descriptions of Qualifications of Proposed Professional Resources

Question: With respect to the qualified resources, there is a minimum requirement of 5 resumes for each resource category listed below. Can the same resource and resource resume be provided for more than one category or must there be 15 separate resources

listed? (i) Case Management Developer/Configuration Specialist; (ii) Software Installation Specialist; and, (iii) Case Management Software Trainer.

Answer: The same resource with associated resource resume can be provided for more than one resource category.

Question 155

Reference: Part 4 – Evaluation Procedures and Basis of Selection, Article 4.4 - Technical Bid Evaluation, Paragraph (f) - Summary of Rated Points for the Technical Bid

Question: Can Canada provide the formula used to convert the Annex C- CMSS – Statement of Requirements, CMSS Rated Requirements Evaluation Criteria points to Part 4 – Evaluation Procedures and Basis of Selection, 4.4 Management Bid Evaluation, (f) Summary of Rated Points for the Technical Bid? The Total Rated Criteria points for the Technical Bid is 3642, however the maximum points for the Annex C – Technical Bid points is 270. Is there any specific formula used to convert the Annex C- CMSS – Statement of Requirements, CMSS Rated Requirements Evaluation Criteria points to the Part 4 – Evaluation Procedures and Basis of Selection, 4.4 Management Bid Evaluation, (f) Summary of Rated Points for the Technical Bid points? As an example, the Rating Criteria Scoring Summary for R-2.1 – R-2.7 is 15% of 3642 points which will equate to 546.3 points, but the maximum points obtained as per Annex C is 21 points. How is the Required Score calculated?

Answer: Bidders should refer to Bid Solicitation Amendement 005, Modification # 006. The weighting (% section weight) will be applied to take the score out of the maximum points, and convert it to a score out of the weighting provided.

The formula is: (Bidder' section score) / maximum points possible for the section) x (% section weight) = Bidder's weighted score for the section. The 70% minimum to pass is 70 out of the 100 adjusted points.

Question 156

Reference: Annex C – Statement of Requirements, Section R-8 - Mobile Access and Applications and Collaborative Technologies, Rated Requirements R-8.2 and R-8.3

Question: As stated in the Mandatory Requirement M-1.11, CMSS will contain Protected B information. In light of the latest developments in lost sensitive personal information in some Government of Canada Agencies (Human Resources and Skills Development Canada, etc.), the follow up directives (HRSDC, Public Safety Canada) severely restricting the saving of any Protected data on any mobile device and according with Public Works and Government Services, Canada Security and Information Services , ISS Industrial Security Manual - Chapter 5 - Handling and Safeguarding of Classified and Protected Information and Assets on laptops and other mobile devices, we recommend to completely remove R-8.3 and the

following text “and synchronize selected information from the server to their local mobile application for user offline use” from R-8.2. Cloud computing-only access to CMSS with no offline synchronization (from regular or mobile devices) would reduce the risk of data security breaches and will fulfil the user’s needs to access CMSS from mobile devices without saving Protected B information on the device.

Answer: Canada has reviewed the request and the requirements remain the same.

Question 157

Reference: Annex C – Statement of Requirements, Section R-8 - Mobile Access and Applications and Collaborative Technologies, Rated Requirement R-8.6.

Question: Can Canada describe how 3rd party social networking tools (e.g. Twitter, Facebook) that allow interaction between internal Users and external customers and stakeholders will be used in the context of a case management solution? What about inadvertently sharing Protected B information through social networking tools?

Answer: Canada will ensure that Protected “B” information are safeguarded.

Question 158

Reference: Annex C - Statement of Requirements - Mandatory Requirement M-3.1 states: “The CMSS must deliver, enable and support secure web-browsing functionality to protect data at the application-layer using: Secure Sockets Layer (SSL 3.0 and above); and, Transport Layer Security (TLS 1.1 and above)”.

Question: In order for any proposed CMSS solution to provide TLS 1.1 support from the client browser, the underlying operating system must be Windows 7 or higher, however the desktop environment specified in Annex D – Technical Environment specifies that the Client Workstations can be the older Windows XP operating system or Windows 7. Would the Crown amend the requirement M-3.1 to be ‘TLS 1.0 and above’ in order to ensure that this requirement can be met even with Windows XP client workstations?

Answer: Canada has reviewed the request and the requirement remains the same.

Question 159

Reference: Part 3 – Bid Preparation Instructions, Article 3.3 - Section II: Management Bid, Paragraph (c) - Descriptions of Qualifications of Proposed Professional Resources

Question: The requirement states that the pool of qualified individuals have the qualification and experience to deliver the work in Article 7.24 Professional Services. In 7.24, it states

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File No. - N° du dossier

123xIEN578-130092

Buyer ID - Id de l'acheteur

123x1

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"The scope of the services for the Installation of the Software is as follows:". It would appear the Crown's intention is for the demonstration that the 15 resources only have the qualifications and experience of sub-items i) through viii) inclusive. However, those eight (8) sub items do not address any qualifications and experience normally indicative of a Case Management Developer/Configuration Specialist and a Case Management Software Trainer. Could the Crown please confirm that it is their intention that the 15 resources have no additional qualification and experience requirements?

Answer: No. In Part 7 - Article 7.24, sub-items i) through viii) indicate the scope of the services to be provided. The resources provided by the successful bidder must have the qualifications and experience required to deliver and install the CMSS described in the bid solicitation and as per the approved task authorizations.

ALL OTHER TERMS AND CONDITIONS REMAIN THE SAME