

**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

<b>Title - Sujet</b> Case Management Software Solution	
<b>Solicitation No. - N° de l'invitation</b> EN578-130092/B	<b>Amendment No. - N° modif.</b> 004
<b>Client Reference No. - N° de référence du client</b> 20130092	<b>Date</b> 2013-04-18
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$XL-123-25647	
<b>File No. - N° de dossier</b> 123xl.EN578-130092	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2013-05-15</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Jalbert, Denise	<b>Buyer Id - Id de l'acheteur</b> 123xl
<b>Telephone No. - N° de téléphone</b> (819) 956-1083 ( )	<b>FAX No. - N° de FAX</b> (819) 953-3703
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b>	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

The amendment is issued to:

- (1) provide answers to questions raised by the Industry;
- (2) modify Part 7 - Resulting Contract Clauses - Article 7.18 - License to the Licensed Software, Subparagraph (i) - Additional Rights - Line items (iii); and,
- (3) remove the wording under Paragraph 7.4 (b) (ii) (B).

### **MODIFICATION 003**

Part 7 - Resulting Contract Clauses - Article 7.18 - License to the Licensed Software, Subparagraph (i) - Additional Rights - Line items (iii) is deleted and is replaced with the following wording:

- (iii) to allow access to the Licensed Software to anyone (including, without limitation Canadians and non-Canadians, other jurisdictions (federal, provincial and municipal government departments, agencies, crown corporations), business, the General Public international partners (governments, institutions and individuals), by any means whatsoever, through Internet, intranets, extranets, virtual private networks, networks, inter-networks or any other way Canada may determine, for the purpose of accessing any government programs, information, data or other services provided by Canada), and which includes but is not limited to using the Licensed Software, including all or any of its components, to access, enter, exchange, search and read information provided by or through any applications provided by Canada from any location irrelevant of the number of Users that have been granted the right to use the Licensed Software under the Contract.

### **MODIFICATION 004**

Part 7 - Resulting Contract Clauses - Paragraph 7.4 (b) (ii) (B) is hereby removed from the bid solicitation.

Documentation must be provided in accordance with 4003 - Supplemental General Conditions, Section 09 - Documentation.

## QUESTIONS AND ANSWERS

### Question 105

**Reference:** Canada-wide Entity License

**Question:** PWGSC has indicated in Table 2 of Annex A that “for information purposes” relating to the “Entity License”, Canada has approximately 377,800 employees which may also be computer users. In Section 7.18, PWGSC defines the “Canada-Wide Entity License” to include “any departments, crown corporations and agencies”. The number of “Users” that could potentially be included in this broad group of organizations that goes beyond Government of Canada employees. Given how difficult it will be to provide pricing for an entity-wide license without knowing the potential usage, we request that PWGSC provide the maximum number of “Users” that would be included in the bidder’s price for an entity-wide license with options to acquire additional Users once that maximum number is reached.

**Answer:** Under each License there is the right to access by an unlimited number of external users. Each License, as stated in Article 7.18 (i) (iii), allows access to the Licensed Software to anyone (see Modification # 003). Canada has approximately 377,800 employees (internal users) which may be computer users and who may use the Licensed Software.

### Question 106

**Reference:** Appendix 2 - Usability Testing Evaluation Criteria

**Question:** Section 1.4 – “Environment Provided by the Bidder” indicates that the bidder will provide an environment which includes the Virtual Desktop that includes access to the CMSS Usability testing environment, file system, MS Outlook, MS Office. Microsoft Corporation is the only vendor who can provide this software and therefore, we feel this requirement provides a non-competitive environment for all other vendors. We recommend that for the Usability Testing, access to MS Outlook, MS Office or any other software not a direct component of the proposed CMSS be excluded. This would ensure the COTS CMSS is fairly assessed.

**Answer:** Canada must be able to access an environment that is maintained by the Bidder to allow Canada to perform the Usability Testing. Canada will provide the required licensing to software products that are not part of the proposed CMSS to perform the Usability Testing if requested by a Bidder that is invited to the Usability Testing.

### Question 107

**Reference:** Annex C, Statement of Requirements, Mandatory Requirement M-3.13

**Question:** Would the Crown provide the technical specification on how to integrate with

myKEY LOGIN?

Are there code examples, or toolkits that can be leveraged?

Is it sufficient to have a secondary logon after the myKEY LOGIN has occurred?

**Answer:** No. A secondary login is not an acceptable approach, particularly if there is no link (use of authentication header) between the two logins. Canada will provide an integration guide with specifications on how to integrate with myKEY LOGIN after contract award to the successful Bidder.

### Question 108

**Reference:** Annex C - Statement of Requirements - Mandatory Requirement M-3.12

**Question:** Would the Crown confirm whether there is any logout function that is provided in API format by the GoC credential service which can be invoked? If so, would the Crown provide greater detail on this logout function?

**Answer:** No. There is no API format logout function provided by the myKEY LOGIN service, although the Client Integration Guide does include a code sample for Logout. Canada will provide the integration guide with specifications on how to integrate with myKEY LOGIN after contract award to the successful Bidder.

### Question 109

**Reference:** Appendix 2 – CMSS Usability Testing -- Paragraph 1.4 - Environment Provided by the Bidder, fourth bullet states: "The Bidder will provide the Testers with web access to a virtual desktop that includes access to the CMSS Usability testing environment, file system, MS Outlook (email, calendar, and contacts) and MS Office (as a minimum will include Word and Excel)".

**Question:** Would the Crown confirm which Version of Outlook and Office will be used on the Testers' desktop? Given that the direction for the Government of Canada is Outlook 2010 and Office 2010 or higher, most departments have implemented or are moving to Outlook 2010 and Office 2010 or higher. Accordingly, would the Crown confirm Outlook 2010 and Office 2010 as the versions for the usability testing to show the most modern experience for the supported client workstations?

**Answer:** The Usability Testing environment supplied by the bidder can include Outlook 2010 and Office 2010.

### Question 110

**Reference:** Part 7, Resulting Contract Clauses -- Article 7.1 - Requirement

**Question:** Does Canada plan on committing to the purchase on an initial number of Users? If so, how many users should vendors plan to implement?

**Answer:** No, the initial number of Users is impacted by the level of effort to reach acceptance of the proposed Case Management Software Solution by the Technical Authority within the GC technical environment, by the ability to deploy the proposed solution and by the ongoing government-wide consolidation initiative. At Contract Award, Canada will acquire the necessary licenses to perform acceptance testing on two installations. As per Part 7 - Resulting Contract Clauses, additional licenses will be acquired by Canada through the exercising of the irrevocable options.

### Question 111

**Reference:** Part 7, Resulting Contract Clauses -- Article 7.4 - 4 Standard Clause and Conditions

**Question:** In Article 7.4 Standard Clause and Conditions, paragraph 7.4(b)(ii)(B) states that the documentation must be delivered in both English and French. The standard SACC Clause states: 4003 09 (2008-05-12) Documentation -- “ .... *If the Software Documentation is available in both of the two official languages of Canada, the Contractor must deliver it in both French and English. If the Software Documentation is only available in either English or French, it may be delivered in that language; however, Canada then has the right to translate it. Canada owns any translation and is under no obligation to provide it to the Contractor. Canada will include any copyright and/or proprietary right notice that was part of the original document in any translation. The Contractor is not responsible for technical errors that arise as a result of any translation made by Canada.*” We recommend this requirement be amended to the standard SACC clause as it could be unfair to vendors bidding under WTO-AGP, NAFTA, CCFTA, CPFTA, CPFTA, CCoIFTA, CPanFTA and AIT.

**Answer:** Canada has reviewed the request and has amended the wording so that it is aligned with the wording in 4003 Section 09 - Documentation.

Paragraph 7.4 (b) (ii) (B) is hereby removed from the bid solicitation.

### Question 112

**Reference:** Annex C - Statement of Requirements

**Question:** As part of the CMSS, does the bidder need to install a BI reporting environment including ensuring ETL jobs with out of the box reporting objects populated?

**Answer:** Yes, the bidder must provide a reporting environment. The proposed Case Management Software Solution must deliver the functionalities in accordance with Annex C- Statement of Requirements.

### Question 113

**Reference:** Part 3 - Bid Preparation Instructions, Article 3.3 - Section II: Management Bid, Sub-article (e) Proposed Installation and Training Plan,

**Question:** "Up to two (2) instances of the CMSS will be installed" Is this referring to Production instances?

**Answer:** The wording is hereby deleted and replaced with the following: "There will be up to two installations of the CMSS". Each installation includes the following environments: Development, Testing, and Production. An installation consists of all components required to provide the solution, including the software instances deployed for each environment. The purpose of the listed assumptions is to provide a baseline in order to evaluate the proposed Training and Installation Plans and does not represent a limitation on the number of installations that may take place during the Contract Period.

### Question 114

**Reference:** Annex C - Statement of Requirements

**Question:** How do you define an Instance? Is this an environment (eg, dev, test, production)? or is an instance a Production instance?

**Answer:** As per Q&A # 099, an installation consists of all components required to provide the solution, including the software instances deployed for each environment. An installation can consist of development, testing, pre-production and production environments.

### Question 115

**Reference:** Part 7 - Resulting Contract Clauses - Article 7.24 - Professional Services

**Question:** Do you anticipate the Bidder conducting any Business Unit-specific Requirements and Business Process workshops to understand the key and common needs across Departments, specifically Industry Canada and PWGSC regarding case management?

**Answer:** No. This is not included in the scope of the Work to be provided by the successful Bidder under the resulting contract.

### Question 116

**Reference:** Appendix 1 - Management Bid Evaluation Criteria, Criteria 25

**Question:** Do you have a discrete count of objects / business transactions for the 4 listed interface systems? For example, SAP and PeopleSoft could have multiple interfaces for master and/or transactional data, Exchange integration could be for email, calendar, both, etc ? Or should we assume the 4 systems = 4

**Answer:** The successful Bidder must deliver, enable and support a suite of Application Programming Interfaces (APIs) and Software Development Kit (SDK) framework for developing custom business logic components and modules that integrate to other systems. Integration point specifications are not available at this time.

The requirement described in the bid solicitation is for 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, that share the basic underlying characteristics commonly found in a Case Management COTS product, and as described in this bid solicitation. The proposed Case Management Software Solution must integrate with other systems to deliver the functionalities in accordance with Annex C- Statement of Requirements.

### Question 117

**Reference:** Appendix 1 - Management Bid Evaluation Criteria

**Question:** Please define the nature of the interfaces with regard to real-time vs batch, unidirectional vs bi-directional for each of the interfaces to be developed.

**Answer:** Integration is the establishment of communication between the proposed Case Management Software Solution and third party systems as outlined in the Management Bid Evaluation Criteria. Information required to deliver the Work described in Part 7 - Resulting Contract Clauses, Article 7.24 - Professional Services in order to deploy the Case Management Software Solution will be provided to the successful Bidder in accordance with the task authorization process.

### Question 118

**Reference:** Annex D - Canada Technical Environment

**Question:** Is there a middleware standard we need to be aware of as part of the

architecture of the integration? Are there defined integration design standards we need to adhere to?

**Answer:** Yes, Bidders must refer to Annex D - Canada Technical Environment for any middleware standard that is required as part of architecture of the integration. Annex E - Information on IT Security Assessment and Authorization has also been provided to Bidder for information purpose. The successful Bidder will be required to support and actively participate in the Security Assessment and Authorization Process described in Annex E -Information on IT Security Assessment and Authorization, specifically the requirements described in Section 3 entitled Security Assurance Requirements. The Contractor will also be required to assist Canada in obtaining final authorization as a result of the Security Assessment and Authorization Process.

### Question 119

**Reference:** Annex D - Canada Technical Environment

**Question:** Can bidders assume that Canada's resources will be 100% responsible for the legacy systems (Non CMSS) of the design and build of the interfaces?

**Answer:** No, Bidders must refer to Part 7 - Resulting Contract Clauses, Article 7.24 for the scope of the Work that may be requested as a result of the bid solicitation. Canada will request the Work using the task authorization process . All deliverables, if requested, will be approved by the Technical Authority.

### Question 120

**Reference:** Appendix 1 - Management Bid Evaluation Criteria, Section 7 - Bidder's proposed Installation and Training Plans, Criteria 21

**Question:** Does Canada has a proposed overall timeline for the Installation and Training phase?

**Answer:** No, Canada does not have a specified timeline for the installation and training that will take place after contract award. However, Canada expects to reach acceptance of the commercial software products within six months of contract award.



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**Question 121**

**Reference:** Annex C - Statement of Requirements

**Question:** Could the Crown please adjust the point rating for mobile capabilities of the CMSS as currently rated in the bid solicitation as a very low point value. Modern Case Management solutions must have mobile built in natively and industry analysts such as Gartner support this differentiation.

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

**Question 122**

**Reference:** Part 3 - Bid Preparation Instructions, Article 3.3 - Section II: Management Bid, Paragraph (e) Proposed Installation and Training Plans

**Question:** Do you want us to include training on best practices around implementation of multi application, multi organization and multi tenant implementation?

**Answer:** The evaluation criteria are contained in Appendix 1 - Management Bid Evaluation Criteria. Additional information can be provided by bidders at their sole discretion and will be evaluated accordingly.

**ALL OTHER TERMS AND CONDITIONS REMAIN THE SAME**