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

LETTER OF INTEREST
LETTRE D'INTÉRÊT

Title - Sujet	
Case Management Software	

Solicitation No. - N° de l'invitation	Date
EP597-123155/A	2012-04-24

Client Reference No. - N° de référence du client	GETS Ref. No. - N° de réf. de SEAG
20123155	PW-$$XL-124-24340

File No. - N° de dossier	CCC No./N° CCC - FMS No./N° VME
124xl.EP597-123155	

Solicitation Closes - L'invitation prend fin	Time Zone Fuseau horaire
at - à 02:00 PM	Eastern Daylight Saving Time EDT
on - le 2012-05-11	

F.O.B. - F.A.B.

Plant-Usine: ☐ Destination: ☐ Other-Autre: ☐

Address Enquiries to: - Adresser toutes questions à:	Buyer Id - Id de l'acheteur
Laassouli, Hicham	124xl

Telephone No. - N° de téléphone	FAX No. - N° de FAX
(819) 956-1209 ( )	(819) 953-3703

Destination - of Goods, Services, and Construction:
Destination - des biens, services et construction:

sent to hicham.laassouli@pwgsc.gc.ca

Comments - Commentaires

Instructions: See Herein

Instructions: Voir aux présentes

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

Delivery Required - Livraison exigée	Delivery Offered - Livraison proposée
See Herein	

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

Telephone No. - N°de téléphone
Facsimile No. - N° de télécopieur

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

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**

Canada

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REQUEST FOR INFORMATION REGARDING

CASE MANAGEMENT SOFTWARE SOLUTION

FOR CANADA

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Annex A: Statement of Requirements

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REQUEST FOR INFORMATION REGARDING

CASE MANAGEMENT SOFTWARE SOLUTION

FOR CANADA

A. 1   Background and Purpose of this Request for Information (RFI)

The goal of this initiative is to provide common and shared case management solutions to departments within the federal government. This is a key initiative that is aligned with the Government of Canada (GC) Information Technology (IT) modernization strategy and focused on enabling government organizations in fulfilling their mandates.

Several groups within the GC have expressed a need to modernize their case management systems. However, they face many challenges in undertaking this activity on an individual basis, due to many issues such as their size and the complexity of the resource requirements these types of IT projects impose. PWGSC is working with these groups in establishing a case management software solution with the following goals in mind:

- Allowing these groups to focus on their core mandates;
- Lowering the total cost of ownership of a CMSS;
- Standardizing the CMSS configuration leading to consolidation; and,
- Reducing the costs to, and increasing the efficiency of, the GC.

It has been determined that several government organizations share common business requirements and have the potential to share a common solution. The CMSS project was established with the objective of acquiring a single commercially available software platform to provide a solution that each organization can configure to meet their specific business needs.

The intent is to have the CMSS hosted and supported within the GC. Ongoing operation and services such as implementation, training, migration, ongoing application updates and support will be managed by the GC, and may include the support of other service providers. It is expected that Industry Canada and PWGSC's Shared Services Integration will be the first adopters of the CMS and it will subsequently be offered to the entire GC community. This solution may become a government supported standard in terms of case management for all departments and agencies.

Ideally, the solution will utilize Web interfaces for GC users and their customers & shareholders and conceptualize the use of mobile and remote access technologies. The CMSS will be configured with the business policies and processes as defined by the various government departments and agencies. The goal of the CMSS will be to integrate the data management infrastructure, applications and systems for simplification of case management.

As with any shared IT application, and particularly where Protected B information is involved, there is a strong focus on the application's approach and capabilities in the areas of multi-tenancy and data segregation.

The objectives of this RFI are as follows:

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(a)   To determine which software providers have a Commercial-off-the-Shelf (COTS) case management software suite that can meet the needs of the project.

(b)   To determine licensing, implementation, maintenance and support options in order to develop a project budget.

(c)   To determine the level of effort required of the vendor for professional services when supporting the implementation and maintenance of the COTS product.

A. 2   Nature of Request for Information

This is not a bid solicitation. This RFI will not result in the award of any contract. As a result, potential suppliers of any goods or services described in this RFI should not reserve stock or facilities, nor allocate resources, as a result of any information contained in this RFI. Nor will this RFI result in the creation of any source list. Therefore, whether or not any potential supplier responds to this RFI will not preclude that supplier from participating in any future procurement. Also, the procurement of any of the goods and services described in this RFI will not necessarily follow this RFI. This RFI is simply intended to solicit feedback from industry with respect to the matters described in this RFI.

A. 3   Nature and Format of Responses Requested

Respondents are requested to provide their comments, concerns and, where applicable, alternative recommendations regarding how the requirements or objectives described in this RFI could be satisfied. Respondents are also invited to provide comments regarding the content, format and/or organization of any draft documents included in this RFI. Respondents should explain any assumptions they make in their responses.

A. 4   Response Costs

Canada will not reimburse any respondent for expenses incurred in responding to this RFI.

A. 5   Treatment of Responses

(a)   **Use of Responses**: Responses will not be formally evaluated. However, the responses received may be used by Canada to develop or modify procurement strategies or any draft documents contained in this RFI. Canada will review all responses received by the RFI closing date. Canada may, in its discretion, review responses received after the RFI closing date.

(b)   **Review Team**: A review team composed of representatives of the client (where applicable) and PWGSC will review the responses. Canada reserves the right to hire any independent consultant, or use any Government resources that it considers necessary to review any response. Not all members of the review team will necessarily review all responses.

(c)   **Confidentiality**: Respondents should mark any portions of their response that they consider proprietary or confidential. Canada will handle the responses in accordance with the *Access to Information Act*.

(d)   **Follow-up Activity**: Canada will meet with each respondent upon request (one-on-one meeting). Following the closing date, the Contracting Authority will follow up individually with all respondents who indicate in their responses that they wish to meet with Canada. Canada intends to request that the Respondent provides an overview of the functionalities of the proposed solution and deliver a demonstration of commercial products so that Canada may obtain a better understanding of case management techniques and processes, and assess their effectiveness with some configuration and test data supplied by Canada. During the demonstration, Canada intends to interact with the Respondent to

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ask questions in order to gain a better understanding of the capabilities of the proposed solution.

(e) **Documentation or any other information** of the proposed solution, tool suite, or supporting third party applications is welcome.
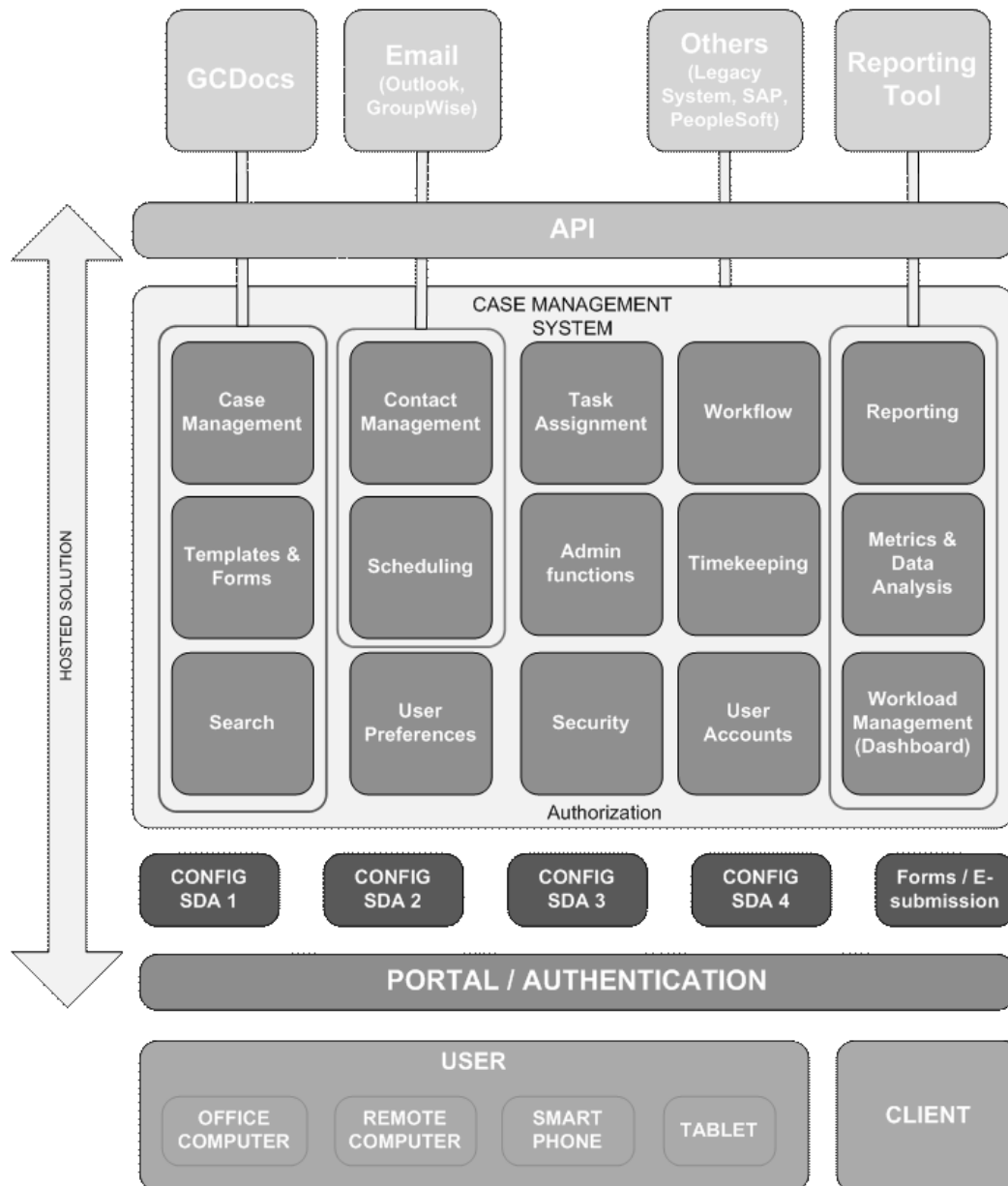
A. 6   Contents of this RFI

(a) This RFI contains a draft Statement of Requirements (see Annex A). This document remains a work in progress, requirements may be added or modified or deleted. Comments regarding any aspect of the draft document are welcome.

(b) This RFI also contains specific questions addressed to the industry.

A. 7   Question to Industry

(a)   Product

Q-1   Our model solution requires a common base configuration that can be used by multiple business units, and will require upgrading over its lifecycle. Customization is not permitted, however, each business unit must be able to configure their representation to meet their particular processes and requirements. This model also assumes that a Software Development Kit (SDK) can be used to develop interfaces to other applications and other functionality. Refer to Figure 1.

1) Referring to the draft Statement of Requirement in Annex A, describe how your product can be tailored to meet a broad range of user requirement without compromising the common base configuration.

2) Describe how the SDK for the proposed solution could be used to augment the capabilities while ensuring it is not impacted by future system upgrades.

3) Describe how your proposed solution makes use of APIs to interface with external applications such as document management, email, reporting, scheduling or portal functions.

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Q-2   Business Process Management (BPM) is considered a core component of the case management software solution (CMSS) and is required to configure the CMS screens and workflows. Describe your BPM capability and its use in configuring the case management solution. If your solution does not include a BPM tool, what other tools are available to perform and/or support this function?

Q-3   The CMSS must be a completely integrated solution, providing all required functionality within a single software product suite. Describe the complete COTS product suite, and the functionality offered as it relates to the CMS capabilities described in the draft Statement of Requirements in Annex A. Please provide a list of any third party software necessary to complete your solution suite. Also provide details related to the support of those third party components: source of support, method of delivery, etc.

Q-4   The operating model assumes that the CMSS will be offered to multiple departments and agencies in a hosted multi-tenant architecture. This is an architecture in which a system can support multiple clients (tenants), through the use of common hardware and software, by partitioning their data and configurations so that they can operate independent of other tenants.

The multi-tenant system allows each client to configure their representation of the application without impacting the common base configuration, and in no way limits or otherwise constrains the configuration flexibility of another business unit.

Furthermore, the solution maintains the integrity and secure separation of the tenant data. Data created and managed by one business unit is in no way accessible by any other business unit.

(1)   Describe how your solution supports a multi-tenant architecture where multiple departments or agencies are hosted.

(2)   Are you able to offer the solution in a Software as a Service (SaaS) environment?

(3)   Describe your security model and its compliance with Government of Canada standards in order to protect data and to control access within the business unit implementations, and across the entire enterprise level implementation.

Q-5   The use of open standards (such as web services standards for security, messaging, interoperability, etc.) in the solution is important for ease of integration with other systems. What other standards are applicable to Case Management?

Q-6   Describe your vision of the future of case management applications and how it may change with advances in technology (e.g. user mobility, user devices, virtualization and hosting architectures, information intelligence, etc.)

(b)   **Product Licensing and Pricing Model**

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Q-7   Given the various case management components that may be included in the proposed solution and given that multi departments may be using the proposed solution, Canada requires a simple license model that is easy to measure, monitor and implement operationnaly. What is the most appropriate unit of measure for licensing purposes i.e. User or Device based up to Entity License?

(c)   **Support and Services**

Q-8   Different clusters will, from time to time, require different types of training and professional services in support of the case management solution. Describe your capabilities in this area including:

(1)   What tools or capabilities can be provided to assist the transition of an organization from an existing system to the proposed case management system (e.g. data migration, process mapping and system configuration, etc.)?

(2)   The training and professional services your company can offer directly and how they are supported. Indicate the approximate number of resources, their certification levels, and availability.

(3)   Provide the approximate number of firms in the National Capital Region, that provide professional services on the proposed case management products;

(4)   Provide the approximate number of resources in the National Capital Region, providing professional services on your proposed case management products, their certification levels, and availability.

Q-9   A Program Centre will be established to support a cluster of users, and is typically comprised of Product Director, Project Manager, Business Analysts, Technical Resources, and Administrative resources. Provide an estimate of the resources required to support the ongoing operation of a system, given scenarios of 3,000 and 10,000 users, including:

(1)   The number, position title, skill set, and certifications for a Program Centre for each scenario. Describe any additional operational assumptions in order to respond to this question. Use the GC category definitions found here http://www.tpsgc-pwgsc.gc.ca/app-acq/sptb-tbps/categories-eng.html

(2)   Describe the level of expertise, certifications, and training required by support teams and individual users within a business unit to effectively support and use the proposed solution suite to its full potential. Describe the approach and methodology you would apply in satisfying this need.

A. 8   Format of Responses

(a)   **Cover Page**: If the response includes multiple volumes, respondents are requested to indicate on the front cover page of each volume the title of the response, the solicitation number, the volume number and the full legal name of the respondent.

(b)   **Title Page**: The first page of each volume of the response, after the cover page, should be the title page, which should contain:

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> (i)   the title of the respondent's response and the volume number;
>
> (ii)   the name and address of the respondent;
>
> (iii)   the name, address and telephone number of the respondent's contact;
>
> (iv)   the date; and
>
> (v)   the RFI number.

(c)   **Numbering System**: Respondents are requested to prepare their response using a numbering system corresponding to the one in this RFI. All references to descriptive material, technical manuals and brochures included as part of the response should be referenced accordingly.

(d)   **Reponse to be sent electronically**: Canada requests that respondents submit their responses electronically by e-mail to the Contracting Authority define below.

A. 9   Enquiries

Because this is not a bid solicitation, Canada will not necessarily respond to enquiries in writing or by circulating answers to all potential suppliers. However, respondents with questions regarding this RFI may direct their enquiries to:

Contracting Authority: Hicham Laassouli

E-mail Address: hicham.laassouli@pwgsc.gc.ca

Telephone: (819) 956-1209

A. 10   Submission of Responses

(a)   **Time and Place for Submission of Responses**: Suppliers interested in providing a response should email their response to the Contracting Authority identified above by the time and date indicated on page 1 of this document.

(b)   **Responsibility for Timely Delivery**: Each respondent is solely responsible for ensuring its response is delivered on time to the Contracting Authority.

(c)   **Identification of Response**: Each respondent should ensure that its name and return address is provided and that the solicitation number and the closing date appear legibly in the subject line of the e-mail.

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ANNEX A

STATEMENT OF REQUIREMENTS

DRAFT

Within the Requirements section the following terms will have the meaning as ascribed in the table below:

Term	Meaning
MS Outlook	Microsoft Outlook version 2003 and higher including email, calendar, contacts, and tasks
MS Office	Microsoft Office suite of application including Word (.doc file format) Excel (.xls file format) PowerPoint (.ppt file format) version 2003 and higher

Mandatory Item Number	Mandatory Requirements Description
M-1 – Overall Mandatory Case Management Requirements	
M-1.1	The proposed solutions 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, as expressed in this bid solicitation including annexes and appendices. o A complete list identifying the names and version of each licensed software component delivered as part of the CMS must be provided.
M-1.2	The proposed solution must provide a multi-tenancy architecture to enable the delivery of independent business unit solutions within a single (n-tier) installation, as well as allow for multiple installations. Bidder must provide a detailed technical description of the multi-tenancy architecture implementation.
M-1.3	The proposed solution, including specifically the application server component, must deliver, enable and support application server "scalability and performance tuning" functionality, through both: 1. Scalability built-in:

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Mandatory Item Number	Mandatory Requirements Description
	a. An integrated function; and
	b. The utilization of such functionality provided by an external (capability –e.g., as provided through a Canada-provided load balancing hardware.
	2. Required performance tuning functionality includes, but is not limited to:
	a. Dynamic load balancing;
	b. Clustering; and,
	c. Caching of components of the application environment to increase performance.
M-1.4	The proposed solution must operate, enable and support horizontal scalability. Horizontal scalability is defined as: "The ability to run a cluster consisting of multiple (3 or more) clones of the presentation Tier and the Business Tier on multiple (2 or more) physical machines.
M-1.5	The proposed solution and specifically the integrated application server must deliver, enable and support a dynamic workload management algorithm(s) that evenly distributes, and balances workload among all servers in a cluster.
M-1.6	The proposed solution and specifically the integrated application server must deliver, enable and support a failover mechanism that will automatically detect failures during the processing of requests and automatically reroute requests to other servers remaining in the cluster.
M-1.7	The proposed solution must deliver, enable and support the functionality to enable the implementation of predefined actions based on specific conditions being detected directly or through the underlying operating system environment (e.g. the implementation of a managed response to a potential "denial of service" incident, or following the detection of predetermined performance or capacity thresholds being exceeded).
M-1.8	The proposed solution must enable and support the centralized and local deployment of all of the components without the need for professional services. What does this means?
M-1.9	The proposed solution must be deployed as an open architecture and provide accessibility through APIs, Web Services, and similar technology to allow for local configuration and third party add-ons.
M-1.10	The proposed solution must deliver, enable and support seamless integration (drag and drop) with MS Outlook and MS Office suite release 2003 and higher.

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Mandatory Item Number	Mandatory Requirements Description
M-1.11	The proposed solution must deliver, enable and support functionality for system administrators to develop distinct development, testing, quality assurance, training and production environments and allow objects and components to be migrated between them for the purpose of developing, testing, and updating the production environments with evolving client case management functionality in an orderly and controlled manner.
M-1.12	The proposed solution must work and interoperate as a secure web browser-based solution that: a. Provides Users with the abilities to work in English and French in its components; b. Ability of users to switch from English to French and vice-versa c. May include server plug-ins; d. May include browser plug-ins; and e. Does not require any other desktop software to be installed on the User's workstation besides a web browser. f. A secure web based browser is one that uses such techniques as Secure Sockets Layer (SSL) and Transport Layer Security (TLS) and information encryption for application-level data transmission purposes.
M-1.13	The proposed solution must deliver, enable and support the storing of documents and data associated with the application, all within the application database.
M-1.14	The proposed solution must deliver, enable and support an Application Programming Interface (API) and Software Development Kit (SDK) framework for developing custom business logic components and modules that integrate with the proposed solution and includes: 1. A Java Enterprise Edition (J2EE) API/SDK framework, 2. .NET version 4.0 API/SDK framework for the product, 3. API/SDK framework documentation that is complete and clear; and 4. All relevant software required to enable the usage of the API/SDK framework. 5. A .NET API/SDK framework is acceptable as long as the solution exposes web based services in a Java EE environment in a way that is compliant with all mandatory requirements that are specified in this Statement Of Requirements.
M-1.15	The proposed solution must deliver, enable, and support the functionalities to allow administrators to set up processes to export selected data for the purpose of adding and updating data to a third party data warehouse.

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Mandatory Item Number	Mandatory Requirements Description
M-1.16	The proposed solution must deliver, enable, and support a configurable web user interface that can be branded in accordance with GoC standards, and conforming to usability standards as described in the Treasury Board Secretariat directive on Standards on Web Usability. http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?section=text&id=24227
M-2 Technical Environment Requirements	
M-2.1	Bidder must provide the description of the full range of hardware and Operating System environment options and requirements for the proposed solution, and describe any desktop requirements such as, but not limited to, plug ins, and utilities.
M-2.2	The proposed solution must deliver, enable and support individual business unit administrator role, where administrators can manage their users independent of other business units.
M-2.3	The proposed solution must be accessible to Users working within a Virtual Desktop (VDI) environment.
M-2.4	The proposed solution must be able to run in a protected B environment; i.e. must be able to work with an encrypted database.
M-2.5	The proposed solution must be accessible to Users working remotely using the following connexion remote access: Citrix Xenapps v5 and higher.
M-2.6	The proposed solution must deliver, enable and support access to separate environments to enable each business unit to evolve their CMSS application in a controlled manner without interruptions to the production environment. This could include: a. Development environment; b. Test environment; c. UAT environment d. Production environment
M-3 Security Requirements	
M-3.1	The proposed solution must work and interoperate with: a. Microsoft Active Directory for Microsoft Server 2003 and above; and b. Lightweight Directory Access Protocol (LDAP) to allow Users to reuse their login across multiple servers.

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Mandatory Item Number	Mandatory Requirements Description
M-3.2	The proposed solution must allow system administrators to: a. Assign, manage and report user and group access to individual solution components and objects; b. Assign, manage and report user and group functionality rights, privileges and restrictions for assigned components; c. Assign, manage and report user and group information access rights, privileges and restrictions ; d. Assign, manage and report user and group access to metadata properties; and e. Track and audit usage for select users, groups and roles.

M-3.3	The proposed solution must deliver, enable and support functionality to allow system administrators to create, assign and disable administrator accounts within each business unit installation.
	
	1. Administrators will be able to create user accounts and to assign end-users within their business unit with appropriate roles and access, including the ability to disable end-user accounts.
	
	2. System administrators and the administrators must be able to manage user profiles within the portal environment including, but not limited to:
	
	    a. Creating user accounts with an associated user profile including security and access attributes appropriate to that user profile;
	
	    b. Creating a group of users with common security attributes and profiles;
	
	    c. Defining "roles" with role-specific attributes (e.g. administrator);
	
	    d. Enrolling users into groups and assigning roles and attributes;
	
	    e. Removing users from groups; and,
	
	    f. Modifying user attributes.

M-3.4	The proposed solution must deliver, enable and support information access security functionality that does not require the users to manage multiple security roles and IDs.
M-3.5	The proposed solution must deliver, enable and support functionality for standardization of a. centralized instances; and

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Mandatory Item Number	Mandatory Requirements Description
	b. distributed instances while ensuring different business unit only have access to the information they are authorized to access within each instance.
M-3.6	The proposed solution must deliver, enable and support security functionality to prevent unauthorized access.
M-3.7	The proposed solution must deliver, enable and support functionality to protect data, and communications from data source through to data presentation.
M-3.8	The proposed solution 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 1.2 and above).
M-3.9	The proposed solution must deliver, enable and support a secure audit trail functionality that include, but are not limited to: a. Recording relevant system events; b. Recording changes to system configurations; c. Recording changes to system related data, e.g. user profile data; and, d. Providing secure access to audit trail data to enable reporting.
M-3.10	The proposed solution must incorporate rollback and recovery functionalities that ensure the integrity of the whole system up to the point that the failure occurred.
M-4 Cross Functional Requirements	
M-4.1	The proposed solution must deliver an integrated search capability across all available clients, stakeholders, cases and event data, including documents and their content. The simple search must be accessible to Userss from all screen? in the application. (could this render everyone non compliant?) The complex search screens must be user configurable and available from a selection list or configurable menu.
M-4.2	The proposed solution must deliver, enable and support functionality for users to export outputs such as reports and search results which may include information in tabular and graphical format in the following file formats: a. Adobe PDF version 1.7 and above; b. MS Word 2003 and above;

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	c. MS Excel 2003 and above;
	d. MS PowerPoint 2003 and above;
	e. MS Outlook 2003 and above;
	f. HTML5 and above;
	g. XML 1.0 and above;
	h. Delimited Text (e.g. CSV); and
	i. Office Open XML (docx) ECMA-376 and later versions.
M-4.3	The proposed solution must deliver, enable, and support functionalities to allow administrators to use integrated design tool to create, view, modify, copy, sort, and publish user screens (UI screens) across all functional areas of the solution, and manage version control over all templates.
M-4.4	The proposed solution must deliver, enable, and support functionalities to allow administrators to define new data elements with various characteristics such as, but not limited to pre-defined validation rules, value ranges, dropdown lists, free form texts with user defined length maximums. The solution must prevent users from accessing and using inactive codes within dropdown lists.
M-4.5	The proposed solution must deliver, enable, and support the exporting of data for the purpose of adding detailed data records to an external data warehouses.
M-5 Client Management Requirements	
M-5.1	The proposed solution must deliver, enable and support client management functionality with template driven and user configurable client profile out-of-the-box.
M-5.2	The proposed solution must deliver, enable and support user configurable data elements within a client profile, including multiples of elements such as multiple address information.
M-5.3	The proposed solution must deliver, enable and support the functionality to allow users to attach documents to a client profile.
M-5.4	The proposed solution must deliver, enable and support the functionality to allow users to maintain client records in an active and inactive status and view client information based on their status, and include and exclude client from search lists and reports based on their status.
M-5.5	The proposed solution must deliver, enable and support the functionality to recognize a client as an individual, an organization, a group of organizations, and a hierarchy of individuals within a client organization.

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M-5.6	The proposed solution must allow users to add new client entries from all areas of the system referencing client information.
M-5.7	The proposed solution must deliver, enable and support the functionality to allow users to associate and attach emails from the user's MS Outlook Mail folder to a client record.
M-5.8	The proposed solution must deliver, enable and support the functionality to allow a user to link a client to one or many cases and to one or many events.
M-5.9	The proposed solution must allow users to view a client profile, and quickly view all cases and events that the client is associated with.
M-5.10	The proposed solution must allow users to record individual interactions (meetings notes, phone calls, etc.) with clients and have the information available to other users when viewing a client profile.
M-5.11	The proposed solution must deliver, enable and support the functionality to allow users to produce client search results list from either a simple or a complex search screen and view and print the results list, or export the results list to any of the following formats; MS Office file format, CSV text file, or a PDF file for download.
M-5.12	The proposed solution must allow administrators to delete inactive client records upon being inactivated, manually after being inactivated, or in batch periodically to clean up the client database. (administrator role?)
M-6 Case Management Requirements	
M-6.1	The proposed solution must deliver, enable and support out-of-the-box simple and complex case management functionality, including generic case template and sets of templates that can be configured by users to meet local case management needs, including a simplified workflow process. Configuration of a case profile must allow the inclusion of such fields that indicate, among other information, the priority, the type, and the level of complexity of the case.
M-6.2	The proposed solution must deliver, enable and support an integrated screen template design wizard tool to allow administrators to configure the case screen templates, add new screen templates, and add additional data elements to the case screen templates, and to reposition data elements on the screen template, and include various custom user screen to collect and display case information form each access point throughout the workflow until the natural conclusion of a case.
M-6.3	The proposed solution must deliver, enable and support an integrated workflow design wizard tool to allow administrators to develop and maintain

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	any number of automated and manual, simple and complex case centric workflows.
M-6.4	The proposed solution must deliver, enable and support configuration tools to define and manage business rules affecting the workflow and progress along the case workflow.
M-6.5	The proposed solution must deliver, enable and support configuration tools to define and manage data validation rules for case data elements and combination of data elements and other data and state factors throughout the workflow process.
M-6.6	The proposed solution must deliver, enable, and support the functionality to allow a User to define which other users will have access to the case.
M-6.7	The proposed solution must deliver, enable, and support the functionality to allow a User to assign a security classification to a case or a document, and restrict those users that can access and view the case and document.
M-6.8	The proposed solution must deliver, enable, and support the functionality to allow a User to re-assign a case to another user based on information gathered in the case; steps arrived at in the case, or manually re-assign a case at any time.
M-6.9	The proposed solution must deliver, enable, and support a User to easily bring in an email from the user's MS Outlook and attach it to a case, and/or a client associated to a case or an Event. Is this a duplicate? See M-5.7
M-6.10	The proposed solution must deliver, enable, and support the functionality to generate system notifications and alerts via email based on predetermined events, activities, status, milestones, and triggers in the workflow.
M-6.11	The proposed solution must deliver, enable, and support the functionality to allow an administrator to design automated document templates and enable the system to complete the document template in the reporting functionality.
M-6.12	The proposed solution must deliver, enable, and support the ability of a User to assign multiple classifications to a case and to view, manage and report on cases by their classification.
M-6.13	The proposed solution must deliver, enable, and support a User to establish relationship between one or more cases, including but not limited to:
	(a) establish a cross references between one case and one or more other cases,
	(b) establish a parent – child relationship between cases

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M-6.14	The proposed solution must allow users to copy and move information from one case to one or several new or existing cases.
M-6.15	The proposed solution must allow users to view and print all or a summary of case information including any relevant text information.
M-6.16	The proposed solution must allow users to perform simple and complex searches to locate a case or a group of cases.
M-6.17	The proposed solution must allow users to close cases, at any time during the workflow (prior to completion and after completion).
M-6.18	The proposed solution must allow users to attach documents to a case at any individual steps in the case workflow, and at the overall case level.
M-6.19	The proposed solution must allow to track changes to case information at the record level and at the field level and enable administrators to define how changes will be tracked.
M-6.20	The proposed solution must deliver, enable, and support administrators to develop scripted and guided workflows with predefined decisions and branching within the workflow based on interactive dialogue process with users.
M-6.21	The proposed solution must allow users to alter the case milestones on a case by case basis after the case have been initiated.
M-7 Event Management Requirements	
M-7.1	The proposed solution must deliver, enable, and support out-of-the-box calendaring functionality to set up and manage Events.
M-7.2	The proposed solution must deliver, enable, and support adminsitrators to configure the standard calendar form template to include local user defined data elements as required for the business unit's needs.
M-7.3	The proposed solution must allow users to add and manage calendar events based on user role.
M-7.4	The proposed solution must allow users to select event participants from the client list, and add new participants and have them added as new client to the client list.
M-7.5	The proposed solution must deliver, enable, and support the functionality to allow users to create events and to send invitation to event participants via email.
M-7.6	The proposed solution must deliver, enable, and support the functionality to allow internal and external participants to respond to event invitations by email and the system will generate and update their event attendance status.

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M-7.7	The proposed solution must allow users to search for events using a simple and/or complex search capability.
M-7.8	The proposed solution must allow administrators to delete and archive events on a periodic basis based on user-defined parameters.
M-7.9	The proposed solution must deliver, enable, and support the functionality to allow users to add a scheduled calendar event to their personal Outlook calendar.
M-8 Document Management Requirements	
M-8.1	The proposed solution must deliver, enable, and support out-of-the-box document management functionality.
M-8.2	The proposed solution must deliver, enable, and support a configurable document profile screen template that enables administrators to include new data elements such as, but not limited to (a) Category, (b) Document State, and (c) Security Level, as required for business units' needs.
M-8.3	The proposed solution must deliver, enable, and support the functionality to allow users to attach documents of any file types to client profile, to a case, and to an event through either a drag and drop or a 'browsing' option.
M-8.4	The proposed solution must deliver, enable, and support the functionality to allow users to attach a document of any file type at the business unit level and not be attached to any client, case or event.
M-8.5	The proposed solution must deliver, enable, and support the functionality to allow users to search for documents. Users should be able to search by any parameter such as but not limited to (a) file name (b) author (c) document title (d) document description (e) category (f) dates created, (g) status, and/or (h) contents.
M-8.6	The proposed solution must deliver, enable, and support the functionality to allow users to create reports from document search result lists.
M-8.7	The proposed solution must deliver, enable, and support the functionality to allow users to assign documents to client profile, case or event after it has been submitted at the business unit level.
M-9 Dashboard Requirements	
M-9.1	The proposed solution must deliver, enable, and support out-of-the-box user configurable Dashboard capability.
M-9.2	The proposed solution must deliver, enable, and support the display of user defined metrics and data within the Dashboard, and enable users to display information in an appropriate display formats including but no limited the Tables, Charts, Graphs, with drill down functionality, and with visual displays of alerts and notifications.

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M-9.3	The proposed solution must deliver, enable, and support the functionality to allow the administrators to configure the Business Unit level Dashboard and make it available in whole and by individual components within the dashboard, to users based on their roles and responsibilities.
M-9.4	The proposed solution must allow users to drill down from the application dashboard displays, to view lower level supporting data, on clients, cases and events.
M-9.5	The proposed solution must deliver, enable, and support an integrated business analytics tools to enable users to develop case metrics dashboard components and reports to produce business information that respond to both the managerial and operational needs of the business unit.
M-10 Reporting Requirements	
M-10.1	The proposed solution must deliver, enable, and support the functionality to allow administrators to develop standard report templates (client, case and event types) and make them available to users to run as and when requested.
M-10.2	The proposed solution must allow users to access standard report templates, and modify them and save them as a local report template that can be viewed when requested.
M-10.3	The proposed solution must deliver, enable, and support the functionality to allow users to develop report templates from any simple and complex search and save the search as a local report template for future use.
M-10.4	The proposed solution must allow users to export an executed report to an MS Office format or a PDF file format.
M-10.5	The proposed solution must deliver, enable, and support the ability to generate static reports and allow to store and manage them as Documents either associated with a client, a case, or an event, or as a stand alone set of report documents maintained at the business unit level.
M-10.6	The proposed solution must deliver, enable, and support the functionality to allow users to develop standard report templates in English with corresponding French versions and vice-versa, and enable users to access and view the report in the language of their choice, based on their current language setting.
M-10.7	The proposed solution must deliver, enable and support the functionality to generate reports based on point in time (for example as of yyyy-mm-dd).

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CMSS - Rated Requirements

All claims of compliance with the stated rated requirements in this section must be fully supported with detailed description and documentation.

This section included 9 sub-sections, and each sub-section is assigned a weight as indicted in the sub-section header. The overall weighted score will be out of 100%.

Rated Item Number	Rated Requirements Description
R-1 General Rated Requirements	
R-1.1	The proposed solution should deliver, enable and support the following data visualization functionality: a. Multiple objects on a page and display like table, chart, picture and text; b. Spark lines – a highly condensed trend line the size of a word; c. Bullet graphs that contain a target indicator within the bar chart; d. Display a series of graphics and charts; e. 2D and 3D chart and graph visualizations; f. 2D graphical representations of data, such as a heat map, that display variables as different intensifying colours; g. Decomposition trees that display each drill-down similar to an organization chart; h. Visual display of alerts as well as User notification by e-mail message. i. Data visualization functions that are named differently but achieve the same effect as the functions listed in this requirement will be acceptable.
R-1.2	The proposed solution should deliver, enable and support PeopleSoft and SAP Integration tools, and should describe any other available third party software integration plug-ins supported.
R-1.3	The proposed solution should deliver, enable and support the versioning of configurations, and the ability to roll back to previous production versions.
R-1.4	The proposed solution should deliver, enable and support a user

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	configurable alert and notification functionality, consolidated as much as possible (can include an individual or a group, and can include internal and external users).
R-1.5	The Bidder should provide an overview of the proposed solution's product release plans and schedules, and identify the policy with respect to support for older releases.
R-1.6	The proposed solution should deliver, enable and support users access to online help information that is: a. Context sensitive; b. Indexed; and c. Available in both official languages
R-1.7	The proposed solution should deliver, enable and allow the exporting of data to either a static file, or a dynamic file, which can be refreshed, with current data when it is re-opened. A dynamic file could be bi-directional thus allowing for updated information in the file to update the CMS application.
R-1.8	The proposed solution should allow users to utilize supplied design tools to perform bulk changes to screen templates and report templates (i.e. change Deputy Minister on all relevant forms)
R-1.9	The proposed solution should allow users to format addresses according to established guidelines in each language including placement, spacing, abbreviation, punctuation, etc. for Canadian addresses French : « Le guide du rédacteur », Bureau de la traduction, Travaux publics et Services gouvernementaux, 2009 http://btb.termiumplus.gc.ca/tpv2guides/guides/redac/index-fra.html?lang=fra English : "The Canadian Style", A guide to writing and editing, PWGSC, 2010 http://btb.termiumplus.gc.ca/tpv2guides/guides/tcdnstyl/index-eng.html?lang=eng and the ability to enter international address formats, mail codes, phone/fax numbers in both French and English.
R-1.10	The proposed solution should allow Users to create notes containing free text and associate them with clients, cases, locations, events at any time during the workflow.
R-1.11	The proposed solution should allow Users to immediately view all

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	associated documents when accessing a file.
R-1.12	The proposed solution should deliver, enable and support functionality to allow the capture of electronic signature on a document, process milestone, a screen template in a workflow, etc. using a recognised technical methodology for electronic signatures.
R-1.13	The proposed solution should deliver, enable and support functionality to allow Users to manage correspondence such as but not limited to the following: - produce individual and bulk correspondence - track the date and time on which the correspondence was received and sent - identify correspondence as related to an existing case - track telephone calls unrelated to any case (call may become the trigger for opening a case)
R-1.14	The proposed solution should deliver, enable and support the functionality to allow Users to perform a mail and merge functionality (database-wide or based on a query) including the ability to have an attachment in an e-mail message created by mail merge.
R-1.15	The proposed solution should deliver, enable and support the functionality to allow Users to e-mail a document(s) from one or several files as an attachment, a link to the document, and as content to the e-mail.
R-1.16	The proposed solution should allow Users to generate reports according to a pre-established schedule and to save those reports to a specified repository and to automatically distribute reports electronically to specified individual(s).
R-1.17	The proposed solution should deliver, enable, and support out of the box data migration tools to enable administrators to set up imports from legacy systems.
R-1.18	The proposed solution should deliver, enable, and support the functionality to allow administrators to define role-based forms.
R-1.19	The proposed solution should deliver, enable, and support the functionality to allow Users to capture links to specific cases and subsection of cases, and to documents in a case, and include the links in an email, in a note, and within a document and workflow screen for easy access to the specific cases or documents.

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R-1.20	The proposed solution should allow Users to customize any search results list by changing the column display order, include a count of the number of items found and displayed, to be able to save the search query as a report and make it available to other users.
R-1.21	The proposed solution should deliver, enable, and support the ability for the User to customize the maximum number of search results that will be displayed in any one search. The solution should not impose a maximum.
R-1.22	The proposed solution should allow Users to terminate a search after it was initiated.
R-1.23	The proposed solution should allow Users to add to favourite lists (i.e. my favourite documents, current cases, etc.)
R-1.24	The proposed solution should deliver, enable, and support the ability for Users to view a list of available report templates, sort the list of report templates alphabetically and by other user defined criteria (sort on each column header of the list of report templates).
R-1.25	The proposed solution should deliver, enable, and support the ability to seamlessly integrate with other email systems. Note: Bidders should provide the name of other email systems that the proposed solutions can seamlessly integrate with.
R-2 Client Management Rated Requirements	
R-2.1	The proposed solution should allow Users to sort and organize the client interaction information so that they can be reviewed, analyzed, and reported on.
R-2.2	The proposed solution should maintain a change history for client profile updates.
R-2.3	The proposed solution should allow Users to select show and hide personal information in a client profile entry (e.g., home telephone number, home address, SIN).
R-2.4	The proposed solution should deliver, enable and support the functionality to allow Users to track telephone correspondence that is unrelated to any case.
R-2.5	The proposed solution should deliver, enable and support the synchronization of clients data with MS Outlook Contact list, import from and export to a User's MS Outlook contact list.

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R-2.6	The proposed solution should allow Users to perform batch modifications to contact entries. For example, modify an address such that all individuals with that address are updated in batch.
R-2.7	The proposed solution should deliver, enable and support the functionality to allow Users to apply effective dates to an address book entry.
R-2.8	The proposed solution should deliver, enable and support the functionality to allow Users to generate and print mailing labels from the client list.
R-2.9	The proposed solution should deliver, enable and support the functionality to allow Users to create a distribution list (customized list of groups, teams of individuals)
R-3 Case Management Rated Requirements	
R-3.1	The proposed solution should allow an user to electronically transfer a case to other available users based on a user's workload and availability.
R-3.2	The proposed solution should deliver, enable, and support the functionality to allow a User to assign a case to an individual based on defined criteria (e.g. area(s) of expertise, years of experience) and manage resources working on cases including the ability to review and/or redistribute the workload of an individual, group/team or available resources, taking into consideration file complexity, recent timekeeping, active file inventory by displaying the information in various formats (e.g. graph or chart format).
R-3.3	The proposed solution should deliver, enable and support configuration tools to enable the administrators to develop a case workflow with serial and/or parallel activities.
R-3.4	The proposed solution should deliver, enable and support the functionality to generate and assign automatically a unique case number to cases as they are initiated.
R-3.5	The proposed solution should deliver, enable, and support the uploading of structured and fillable files (Word, Excel, PowerPoint, and a fillable PDF) to be processed and to initiate a new case, to update existing case information, and to add incremental information to an existing case.
R-3.6	The proposed solution should deliver, enable, and support the ability to assign a new case to a user based on availability of resources, based pm a given role in the organization, and based to the user manually initiating the case.

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R-3.7	The proposed solution should deliver, enable, and support the ability to assign cases to a queue from where cases can be assigned by supervisors, and auto assigned when appropriate resources become available.
R-3.8	The proposed solution should deliver, enable, and support the ability to re-assign a case to a queue and make it available for assigning to other users.
R-3.9	The proposed solution should deliver, enable and support the functionality to allow Users to associate cases, and step(s) in case workflow to specific calendar events.
R-3.10	The proposed solution should deliver, enable, and support the functionality to allow Users to archive cases.
R-3.11	The proposed solution should deliver, enable, and support the functionality to allow administrators to delete closed and inactive cases on a scheduled basis.
R-3.12	The proposed solution should deliver, enable, and support the functionality to allow Users to track case workloads by resources and produce alarms based on caseloads.
R-3.13	The proposed solution should deliver, enable and support the functionality to allow Users to flag information that is not yet available and include the ability to set a reminder for completion.
R-3.14	The proposed solution should deliver, enable and support the functionality to allow Users to generate a list of cases that do not comply with mandatory data requirements for completion. The solution should prevent the closing of a case until all mandatory information has been entered.
R-3.15	The proposed solution should deliver, enable and support the functionality to allow Users to close a case and multiple cases in a batch and group
R-3.16	The proposed solution should deliver, enable and support the functionality to allow Users to hide case data that is deemed confidential information, and only made available to those who are allowed to view it.
R-3.17	The proposed solution should deliver, enable and support the functionality to allow Users to add a participant from the client list by starting to type the name and the system displays the list of matching client as the user is typing (type-ahead feature).
R-3.18	The proposed solution should deliver, enable and support the

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	functionality to allow Users to apply effective dates for participants to be included in a case.
R-3.19	The proposed solution should deliver, enable and support a user to apply bulk updates to information within a case, or to a group of cases.
R-3.20	The proposed solution should deliver, enable and support the functionality to allow Users to view and sort all documents associated with a case.
R-4 Event Management Rated Requirements	
R-4.1	The proposed solution should allow Users to send rich content email event invitations.
R-4.2	The proposed solution should deliver, enable and support the functionality to allow Users to:
	- automatically calculate and recalculate due dates for key events/activities on a case
	- generate reminder and BF dates accordingly
	- transfer all reminders, BFs, and due dates when a case is transferred from one individual to another.
R-4.3	The proposed solution should deliver, enable, and support the functionality to allow administrators to configure and maintain multiple version of the calendar event form (template) within the business unit.
R-4.4	The proposed solution should deliver, enable, and support the functionality to allow administrators to define categories and be able to define various categorizations of events, and enable users to view, manage and report on events by categories.
R-4.5	The proposed solution should deliver, enable, and support the functionality to allow Users to create report(s) from the event search list.
R-4.6	The proposed solution should deliver, enable, and support the functionality to allow Users to export the event search list or report to any MS Office file format.
R-4.7	The proposed solution should deliver, enable, and support the functionality to allow Users to schedule, reschedule, cancel singles and recurring events and calendar activities, copy events, copy events from one case to another, lock an event to prevent changes, and mark events as competed.
R-4.8	The proposed solution should deliver, enable, and support the

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	functionality to automatically generate and send out reminders for scheduled events to participants.
R-4.9	The proposed solution should deliver, enable, and support the system recognize statutory holidays on the calendar, and incorporate these holidays when setting up entries with date ranges.
R-5 Documents Management Rated Requirements	
R-5.1	The proposed solution should deliver, enable and support the functionality to allow Users to manage iterative versions of a document (including correspondence) using a 'check-in check-out' feature, as well as to mark a document as "final" thereby restricting the ability to make any further modifications.
R-5.2	The proposed solution should deliver, enable, and support the functionality to allow Users to apply retention schedules to stored documents.
R-5.3	The proposed solution should deliver, enable, and support the functionality to allow administrators to delete and/or archive documents based on retention schedules.
R-5.4	The proposed solution should deliver, enable, and support the ability to restrict the deletion of a document to either the author or owner and a designated individual.
R-5.5	The proposed solution should allow Users to print a document without having to open the document.
R-5.6	The proposed solution should allow Users to display a list of all documents associated to a case, open one and more documents at a time, while still being able to access the document list.
R-5.7	The proposed solution should allow Users to submit a document for review, approval, and to solicit comments, and the ability of the user to track the status of the review process.
R-5.8	The proposed solution should allow Users to cross-reference a document to one and more other documents.
R-5.9	The proposed solution should deliver, enable, and support the functionality to allow Users to import and manage large volumes and documents, images, videos, and audio that requires specialized software to view them. This can be done by linking, not necessarily storing the information inside the case management system (eDisclosure). Also, the ability to access and utilize the electronic forms from any website, and save the completed forms to a specific case.

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R-5.10	The proposed solution should deliver, enable, and support the functionality to allow Users to create a composite document from a number of individual documents contained in the Document repository for a case, client, event, or at the business unit level.
R-6 Dashboard and Business Analytics Rated Requirements	
R-6.1	The proposed solution should deliver, enable, and support the functionality to allow Users to further configure their own dashboard view, to meet their individual reporting and work management requirements, such as, but not limited to personal work metrics, task list, status list, upcoming events, announcements, and alarms.
R-6.2	The proposed solution should deliver, enable, and support the functionality to allow Users to export data from the dashboard displays to any file format for further analysis and reporting.
R-6.3	The proposed solution should deliver, enable, and support the functionality to allow Users to set up reports that are run on a scheduled basis and make them available to other users as static reports.
R-6.5	The proposed solution should deliver, enable and support the functionality to allow Users to access a SQL reporting tool or wizard to enable non-technical users to build custom reports, and dashboard views.
R-6.6	The proposed solution should deliver, enable and support the functionality to produce analytics reports based on workload trends for specific criteria.
R-6.7	The proposed solution should deliver, enable and support advanced case performance metrics for on time delivery and identification of problems and issues. These are to be available as reports on a daily, weekly, monthly and annual basis including roll-ups of data and/or a snapshot at a given point in time.
R-6.8	The proposed solution should deliver, enable and support processes to analyze and compare historical data, perform trend analysis and produce reports on trends, statistics, etc.
R-7 Workload / Resource Management Rated Requirements	
R-7.1	The proposed solution should provide, enable and support the functionality to allow Users to view and manage their own workload and to enable managers to manage the assignment of cases to available resources, to balance the workload, and reprioritized open cases assigned to individual resources.

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R-7.2	The proposed solution should provide, enable and support the functionality to allow Users to track events, activities, statuses, people and their locations, time spent on activities, events, cases, etc..
R-7.3	The proposed solution should provide, enable and support a time reporting functionality to enable users to report their time to a Case or other tasks and activities on a daily weekly and monthly basis.
R-7.4	The proposed solution should provide, enable and support the ability to report on user time spent by cases, tasks, or sub tasks, or non case related tasks and activities.
R-8 Mobile Access and Mobile Applications	
R-8.1	The proposed solution should provide, enable and support the functionality to allow Users to access the solution via their smartphones (BlackBerry, Android and iPhone) and tablet (PlayBook, Android or iPad) device's web browser, and display the user interface in an appropriate form factor for the given device. Bidder should describe security and access requirements.
R-8.2	The proposed solution should provide, enable and support synchronization of CMSS data created on Users' mobile device to the server when the user is reconnected to the network.
R-9 Stakeholder Relationship Management	
R-9.1	The proposed solution should provide, enable and support an external portal for controlled access by case specific clients.
R-9.2	The proposed solution should provide, enable and support the provision of limited and controlled access to portions of the case management file to external clients. These external clients could view, comment and submit input and upload their documents to a case, and as appropriate obtain case status information, view reports, and download information.