

**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**  
THIS DOCUMENT CONTAINS A SECURITY  
REQUIREMENT

**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> GC CORRESPONDENCE MANAGEMENT SYSTEM	
<b>Solicitation No. - N° de l'invitation</b> EN578-133379/A	<b>Amendment No. - N° modif.</b> 001
<b>Client Reference No. - N° de référence du client</b> 20133379	<b>Date</b> 2013-09-25
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$XL-114-26372	
<b>File No. - N° de dossier</b> 114xl.EN578-133379	<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 2013-10-22</b>	
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Niyonambaza, Audace	<b>Buyer Id - Id de l'acheteur</b> 114xl
<b>Telephone No. - N° de téléphone</b> (819) 956-5017 ( )	<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>

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**THE SOLICITATION AMENDMENT #001 IS RAISED TO MODIFY THE BID SOLICITATION AND TO ANSWER QUESTIONS FROM THE INDUSTRY.**

**Modification #001**

**Reference**

**Bid Closing Date**

**Modification #001:**

The Bid Closing Date is hereby extended from October 15, 2013 to **October 22, 2013**.

**Modification #002**

**Reference**

Mandatory Requirement M7

**Modification:**

Mandatory Requirement M7 is hereby modified to read as follows:

*"The GCCMS must allow a User to bulk import and export Content to facilitate a mail-in campaign."*

**Modification #003**

**Reference**

Mandatory Requirement M13

**Modification #003:**

Mandatory Requirement M13 is hereby modified to read as follows:

*"The GCCMS must be SQL-compliant and interoperate with Oracle or SQL Server."*

**Modification #004**

**Reference**

Mandatory Requirement M37

**Modification #004:**

Mandatory Requirement M37 is hereby modified to read as follows:

*"The GCCMS must automatically populate other Metadata Elements where appropriate, based on business rules, when certain Metadata is selected.*

*For example, if the Metadata Value 'Urgent' is selected by a User, the GCCMS must automatically populate the Metadata field for 'Deadline' with a date that is 2 days from the present, rather than the normally-calculated date of 15 days from the present."*

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### Modification #005

**Reference**

Mandatory Requirement M51

**Modification #005:**

Mandatory Requirement M51 is hereby modified as follows:

*"The GCCMS must allow a User to run, view and save a report created by an Administrator, based on any combination of Metadata Elements."*

### Modification #006

**Reference**

Mandatory Requirement M71

**Modification #006:**

Mandatory Requirement M71 is hereby modified to read as follows:

*"The GCCMS must be able to use dynamic links to work with electronic documents and email stored in an EDRMS.*

*For example, if a document entitled 'Briefing Note' is a Case Item attached to a Case, a User should be able to click on this document to open it without having to enter the EDRMS and search for the document."*

### Modification #007

**Reference**

Point-Rated Requirement R7

**Modification #007:**

Point-Rated Requirement R7 is hereby modified to read as follows:

*"The GCCMS should work with and allow access to third-party reporting and business intelligence tools, including, but not limited to Crystal Reports."*

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### Modification #008

**Reference**

Point-Rated Requirement R14

**Modification #008:**

Point-Rated Requirement R14 is hereby modified to read as follows:

“The GCCMS should work with MySQL or DB2.”

### Modification #009

**Reference**

Point-Rated Requirement R16

**Modification #009:**

Point-Rated Requirement R16 is hereby modified to read as follows:

*“The GCCMS should handle different Date and Time Formats (DTF), including but not limited to the World Wide Web Consortium (W3C) syntax and TBITS 36: All-Numeric Representation of Dates and Times - Implementation Criteria (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=17284&section=text#sec1.1>).”*

### Modification #010

**Reference**

Point-Rated Requirement R21

**Modification #010:**

Point-Rated Requirement R21 is hereby modified to read as follows:

*“The GCCMS should allow messages to be moved from/to Microsoft Outlook from/to the GCCMS. An incoming message should be automatically entered and saved in the GCCMS.*

*For example, assume that a Department or Group has set up a mailbox. Incoming email messages or Correspondence should be automatically entered and saved in a new Case Profile, and assigned to the configured party.*

*If a record already exists, the incoming information should automatically update the applicable Case Profile.”*

**Modification #011****Reference**

Point-Rated Requirement R22

**Modification #011:**

Point-Rated Requirement R22 is hereby modified to read as follows:

*"The GCCMS should be compliant with Content Management Interoperability Services (CMIS) requirements. Please refer to [https://www.oasis-open.org/committees/tc\\_home.php?wg\\_abbrev=cmis](https://www.oasis-open.org/committees/tc_home.php?wg_abbrev=cmis) for additional information on CMIS."*

**Modification #012****Reference**

Point-Rated Requirement R36

**Modification #012:**

Point-Rated Requirement R36 is hereby modified to read as follows:

*"The GCCMS should allow a System Administrator to specify a timeout value for User searches."*

**Modification #013****Reference**

Point-Rated Requirement R51

**Modification #013:**

Point-Rated Requirement R51 is hereby modified to read as follows:

*"The GCCMS should allow a User to configure a Task to correspond to a pre-determined response timeline, subject to Access Rights."*

**Modification #014****Reference**

Point-Rated Requirement R66

**Modification #014:**

Point-Rated Requirement R66 is hereby modified to read as follows:

*"The GCCMS should allow a User to attach a report using Microsoft Outlook."*

## QUESTIONS AND ANSWERS

### Question #001

**Reference:**

Mandatory Requirement M80:

*The Bidder must have extensive experience completing individual and simultaneous CMS implementation projects of this size and complexity, both on time and on budget.*

*Simultaneous projects are defined as two or more CMS (or equivalent enterprise business application) implementation projects completed simultaneously (i.e., when there was 2-6 months or more of overlap between the start and end dates of each project).*

*The Bidder must also provide verifiable evidence that it has a positive track record rolling out a CMS solution across Canada, and providing task-based training and technical support to clients with a minimum of 500 users.*

**Question #001:**

We are seeking clarification on project reference information. On page 11 of the RFP the Government of Canada describes the client and project information required from the vendor, however in Appendix 1, page 15, Mandatory Requirement M80 the requirement requires the client reference information must be from examples of rollouts across Canada. These requests do not align. Furthermore we feel that a client reference should not be limited to only Canada as a correspondence management system roll out can be the same or similar regardless of the country where it is deployed.

Can we please have the paragraph read: *"The Bidder must also provide verifiable evidence that it has a positive track record rolling out a CMS solution across Canada, and providing task-based training and technical support to clients with a minimum of 500 users."*

**Answer #001:**

The third paragraph in Mandatory Requirement M80 has been revised to read: *"The Bidder must also provide verifiable evidence that it has a positive track record rolling out a CMS solution to Users in multiple, geographically-dispersed locations, and providing task-based training and technical support to Clients with a minimum of 500 Users."*

### Question #002

**Reference:** Bid Solicitation Closing Date

**Question #002:**

Due to the size and complexity of this RFP, we respectively request an extension in order to provide a quality response.

**Answer #002:**

Canada has reviewed the request and has granted an extension of the bid solicitation closing date until **October 22, 2013**. Please refer to Modification no. 001 in this Bid Solicitation Amendment.

### Question #003

**Reference:** Bid Solicitation Closing Date

**Question #003:**

Will Canada grant an extension of 3 weeks to the submission deadline (November 5, 2013)?

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**Answer #003:**

Canada has reviewed the request and has granted an extension of the bid solicitation closing date until **October 22, 2013**. Please refer to Modification no. 001 in this Bid Solicitation Amendment.

**Question #004**

**Reference:**

Rated Requirements

**Question #004:**

The rated scoring is currently listed as an all or nothing. How will Canada accurately reflect vendor capabilities if the requirement is partially met?

**Answer #004:**

For this procurement process, Canada requires a COTS system that meets a rated requirement out-of-the-box or by configuring existing functionality. Thus, a Vendor that clearly meets a rated requirement with a Point Value of 0 or 3 will receive a Score of 3. If a Vendor clearly meets a rated requirement with a Point Value of 0 or 1, it will receive a Score of 1.

**Question # 005**

**Reference:**

Point-Rated Requirement R22:

*The GCCMS should be compliant with Content Management Interoperability Services (CMIS) requirements.*

**Question #005:**

Regarding Point-Rated Requirement R22 – will Canada confirm this rated requirement is referring to: <http://www.tbs-sct.gc.ca/ws-nw/index-eng.asp>?

**Answer #005:**

Point-Rated Requirement R22 has been modified to read: "*The GCCMS should be compliant with Content Management Interoperability Services (CMIS) requirements. Please refer to [https://www.oasis-open.org/committees/tc\\_home.php?wg\\_abbrev=cmis](https://www.oasis-open.org/committees/tc_home.php?wg_abbrev=cmis) for additional information on CMIS.*"

**Question #006**

**Reference:**

Mandatory Requirement M74:

*The GCCMS must work with Microsoft Outlook.*

Point-Rated Requirement R66:

*The GCCMS should allow a User to attach a report using any email program approved by the Government of Canada.*

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**Question #006:** The Enterprise E-Mail Solicitation Bid resulted in Microsoft Outlook being selected as the standard email client. Given this, we request that this rated requirement be removed or revised to reflect the standardization of Outlook as the email program.

**Answer #006:**

Mandatory Requirement M74 remains unchanged.

Point-Rated Requirement R66 has been modified to read: "*The GCCMS should allow a User to attach a report using Microsoft Outlook.*"

**Question # 007**

**Reference:**

Mandatory Requirement M13

*The GCCMS must work with database management systems, including, but not limited to Oracle and SQL Server.*

**Question #007:**

Regarding Mandatory Requirement M13: In this mandatory requirement, Canada has specified that the GCCMS must work with database management systems, including but not limited to Oracle and SQL Server. As many vendors support one or another database platforms, we suggest revising the requirement to reflect the requirement as an "or", for example: "*The GCCMS must work with database management systems, including but not limited to Oracle and or SQL Server.*"

**Answer #007:**

Mandatory Requirement M13 has been modified to read: "*The GCCMS must be SQL-compliant and interoperate with Oracle or SQL Server.*"

**Question #008**

**Reference:**

Point-Rated Requirement R7:

*The GCCMS should work with and allow access to third-party reporting and business intelligence tools, including, but not limited to Crystal Reports and SQL Server Reporting Services (SSRS).*

**Question #008:** In this rated requirement, Canada indicates that the GCCMS should work with and allow access to third-party reporting and business intelligence tools, including but not limited to Crystal Reports and SQL Server Reporting Services. In order to ensure a broad set of options, we suggest revising the requirement to reflect the requirement as an "or", for example: "*The GCCMS should work with and allow access to third-party reporting and business intelligence tools, including but not limited to Crystal Reports and or SQL Server Reporting Services (SSRS).*"

**Answer #008:**

Point-Rated Requirement R7 has been revised to read: "*The GCCMS should work with and allow access to third-party reporting and business intelligence tools, including but not limited to Crystal Reports.*"

**Question #009**

**Reference:**

Point-Rated Requirement R14:

*The GCCMS should work with MySQL and DB2.*

**Question #009:** In this rated requirement, Canada indicates the GCCMS should work with MySQL and DB2. In order to ensure a broad set of options, we suggest revising the requirement to reflect the requirement as an "or", for example: "The Crown indicates the GCCMS should work with MySQL **and or** DB2."

**Answer #009:**

Point-Rated Requirement R14 has been revised to read: "*The GCCMS should work with MySQL or DB2.*"

**Question #010****Reference:**

Mandatory Requirements M13, M73 and M74  
Point-Rated Requirement R7, R8 and R14

**Question #010:**

The RFP lists several mandatory and rated requirements, such as:

- M13: *The GCCMS must work with database management systems, including but not limited to Oracle and SQL Server.*
- M73: *The GCCMS must provide a web service this is platform independent and works with any browser, including but not limited to Microsoft Internet Explorer 8+, Google Chrome 23+ and Mozilla Firefox 17+.*
- M74: *The GCCMS must work with Microsoft Outlook.*
- R7: *The GCCMS should work with and allow access to third-party reporting and business intelligence tools, including but not limited to Crystal Reports and SQL Server Reporting Services (SSRS).*
- R8: *The GCCMS should allow a System Administrator to modify out-of-the-box, online help Content without additional tools, such as the display of organization specific, business Workflow procedures and terminology.*
- R14: *The GCCMS should work with MySQL and DB2.*

Will Canada provide a target technical environment which describes the various requirements, such as the environment provided in the Case Management Solicitation (refer to Solicitation EN578-130092/B Annex D)?

**Answer #010:**

No, Canada will not provide a target technical environment which describes the various requirements. Bidders should refer to Figure B-2 Potential To-Be Architecture at DFO on page B2 of Annex B – Statement of Work for Implementation fo the GCCMS by Fisheries and Oceans Canada (DFO), and to the technical requirements as described in Annex A - Statement of Requirements.

**Question #011**

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**Reference:**

**Mandatory Requirement M10:**

*The GCCMS must include a viewer.*

*The viewer does not have to be embedded in the core product within the GCCMS, or built by the Contractor. The GCCMS must work with a range of viewers currently used by the federal government that work with the standard file formats identified under R12.*

*The GCCMS could incorporate a web-based file preview tool that allows the User to view a document without having to download the file.*

*A client-side viewer would also enable viewing documents in various file formats.*

**Point-Rated Requirement R12:**

*The GCCMS should include a viewer that works with standard file formats, including, but not limited to .bmp, .doc, .docm, .docx, .gif, ISO/IEC 26300, ISO/IEC 29500, .jpeg, .jpg, .jpg2000, .msg, .mso, .odf, Office Open XML, .pdf, .png, .ppt, .pptx, .rtf, .tiff, .tst, .vsd, .wpd, .xls, .xlsm and .xlsx.*

**Question #011:**

Please confirm that the following viewers are currently in use by the federal government: ExamView Test File and Microsoft Organization Chart?

**Answer #011:**

Canada cannot confirm that either of these viewers are in use.

**Question #012**

**Reference:**

**Point-Rated Requirement R16**

*The GCCMS should handle different Date and Time Formats (DTF), including, but not limited to the World Wide Web Consortium (W3C) syntax and ISO 639-2/T codes.*

**Question #012:**

The ISO 639-2/T codes are a Representation of Names and Languages ([http://www.loc.gov/standards/iso639-2/php/code\\_list.php](http://www.loc.gov/standards/iso639-2/php/code_list.php)) and they do not include Date and Time.

Will Canada award the full score (three (3) points) to a Vendor that meets TBITS 36: All-Numeric Representation of Dates and Times - Implementation Criteria (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=17284&section=text#sec1.1>)?

**Answer #012:**

Point-Rated Requirement R16 has been modified to read: "*The GCCMS should handle different Date and Time Formats (DTF), including but not limited to the World Wide Web Consortium (W3C) syntax and TBITS 36: All-Numeric Representation of Dates and Times - Implementation Criteria (*<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=17284&section=text#sec1.1>*).*"

**Question #013**

**Reference:****Mandatory Requirement M80:**

*The Bidder must have extensive experience completing individual and simultaneous CMS implementation projects of this size and complexity, both on time and on budget.*

*Simultaneous projects are defined as two or more CMS (or equivalent enterprise business application) implementation projects completed simultaneously (i.e., when there was 2-6 months or more of overlap between the start and end dates of each project).*

*The Bidder must also provide verifiable evidence that it has a positive track record rolling out a CMS solution across Canada, and providing task-based training and technical support to clients with a minimum of 500 users.*

**Question #013:**

The RFP refers to 'previous experience with Correspondence Management Systems'. However, it does not specifically state "previous experience implementing the proposed solution."

Will Canada permit respondents to propose the best solution, even if they have no experience with that specific tool, (but have the requisite experience with another tool) with the argument that expertise arguably lies in process rather than the tool itself?

**Answer #013:**

Yes, as long as the proposed GCCMS is an existing and proven solution. Canada requires a system with processes that are well defined and ready-to-use.

**Question #014****Reference:****Mandatory Requirement M10**

*The GCCMS must include a viewer. The viewer does not have to be embedded in the core product within the GCCMS, or built by the Contractor. The GCCMS must work with a range of viewers currently used by the federal government that work with the standard file formats identified under R12. The GCCMS could incorporate a web-based file preview tool that allows the User to view a document without having to download the file. A client-side viewer would also enable viewing documents in various file formats.*

**Question #014:**

Are native applications considered a viewer?

**Answer #014:**

No. The purpose of a viewer is to allow a user to view documents in the absence of the native application.

**Question #015****Reference:****Mandatory Requirement M37**

*The GCCMS must automatically populate other Metadata Elements where appropriate, based on business rules, when certain Metadata is selected. If the Metadata Value 'Urgent' is selected by a User, the GCCMS*

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*must automatically populate the Metadata field for 'Deadline' with a date that is 2 days from the present, rather than the normally- calculated date of 15 days from the present.*

**Question #015:**

Are there any specific metadata elements that need to be populated based on rules when certain metadata is selected?

**Answer #015:**

Mandatory Requirement M37 has been modified to read: *"The GCCMS must automatically populate other Metadata Elements where appropriate, based on business rules, when certain Metadata is selected.*

*For example, if the Metadata Value 'Urgent' is selected by a User, the GCCMS must automatically populate the Metadata field for 'Deadline' with a date that is 2 days from the present, rather than the normally-calculated date of 15 days from the present."*

**Question #016**

**Reference:**

Mandatory Requirement M51

*The GCCMS must allow a User to create, run, view and save a report based on any combination of Metadata Elements, including system- and User-generated Content.*

**Question #016:**

Is the requirement to have standard Users (not IT or Administrators) create/code new report templates, or simply to have a User run report templates to generate formatted output, such as Excel, PDF and TIFF, allowing the IT or Administrators to create/code new report templates? For example, the IT or Administrators would create a Crystal Reports file that would be added to the list of reports available in the GCCMS. The User would have the ability to run the report and generate output.

**Answer #016:**

Mandatory Requirement M51 has been modified to read: *"The GCCMS must allow a User to run, view and save a report created by an Administrator, based on any combination of Metadata Elements."*

**Question #017**

**Reference:**

Mandatory Requirement M53

*The GCCMS must allow the system to auto-populate default Metadata Elements, based on business rules, at least including those for registering a Correspondence Item, creating a Case and Profile, and identifying a Task.*

**Question #017:**

Are there any specific metadata elements that need to be populated based on rules? Can you provide examples?

**Answer #017:**

Examples would include, but are not limited to the following:

- A Case may have a reference number that should be self-generating and filled in automatically;
- The Creation Date field for a Case or Action should auto-populate with the current date; and
- An Author field for a Case should auto-populate with the name of the current User.

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### Question #018

**Reference:**

*Mandatory Requirement M55*

*The GCCMS must allow a System Administrator to define the default attributes and behaviour of a Metadata Element, based on business rules.*

**Question #018:**

Are there any specific Metadata Elements that need to be populated based on business rules? Please provide examples.

**Answer #018:**

Mandatory Requirement M55 refers to default values for the entire system.

For example, with GCDOCS (OpenText Content Server), you can create a custom attribute – essentially a Metadata Element – that can be defined as required, including but not limited to:

- A string, check box or drop down;
- How you enter a string (e.g., in alpha or numeric format, and a specific number of characters);
- Defined pre-populated values in tables; and
- How a value might trigger other functionality (i.e., selecting a certain value, such as ON may trigger the population of cities in Ontario to choose from).

In RDIMS (OpenText eDOCS DM), you could select a 'Mark Official' checkbox and trigger a script to make the content of a document Read-Only to everyone on the Access List. It could also add the 'Records Classifiers' group to the Access List for recordkeeping purposes.

### Question #019

**Reference:**

*Mandatory Requirement M72*

*The GCCMS must provide the functionality to map Metadata from/to the system and other repositories, and auto-populate Metadata Elements in a Correspondence Item from OpenText API, at least including Title, Description, Notes and Comments*

**Question #019:**

Could you please provide a scenario that illustrates how the mapping and auto-populating would occur.

**Answer #019:**

Assume that a Correspondence Item has two Metadata Fields - 'Title' and 'Sensitivity'. If the User adds a document from an EDRMS, it would retrieve the 'Title' and 'Sensitivity' of the document based on the EDRMS Metadata, and set the appropriate Metadata Values in the GCCMS Correspondence Item.

If a User exports a document from the GCCMS to an EDRMS, it would perform a similar mapping and set Metadata Values in the EDRMS Document Profile, where configured, based on Metadata from the GCCMS.

In order to maintain this mapping, it may be necessary to obtain Metadata Values from the EDRMS. This implementation detail is up to the Vendor.

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### Question #020

**Reference:**

Point-Rated Requirement R13

*The GCCMS should allow a User to toggle at any time from/to Canadian English and Canadian French without losing data already entered.*

**Question #020:**

Please define 'already entered'. Does this mean unsaved data typed on the screen or previously-saved data?

**Answer #020:**

This is referring to unsaved data typed on the screen. For example, if a user begins typing text in a text field and decides to switch to Canadian French, the switching action should save the data and then perform the switch.

### Question #021

**Reference:**

Point-Rated Requirement R21

*The GCCMS should allow automated or semi-automated messages to be moved from the email program to the GCCMS.*

**Question #021:**

Could you please provide an example of an automated message and a semi-automated message?

**Answer #021:**

Point-Rated Requirement R21 has been modified to read: *"The GCCMS should allow messages to be moved from/to Microsoft Outlook from/to the GCCMS. An incoming message should be automatically entered and saved in the GCCMS.*

*For example, assume that a Department or Group has set up a mailbox. Incoming email messages or Correspondence should be automatically entered and saved in a new Case Profile, and assigned to the configured party.*

*If a record already exists, the incoming information should automatically update the applicable Case Profile."*

### Question #022

Question #022 is intentionally left blank.

**Question #023****Reference:**

Point-Rated Requirement R50

*The GCCMS should track the disposition of Content and Metadata, such as a Correspondent, Case, Case Object, Task and Profile, as well as their associated Metadata Values.*

**Question #023:**

Do you mean tracking who disposed of the Content and Metadata, or simply recording the fact that content and metadata was disposed? Please provide examples with scenarios?

**Answer #023:**

The GCCMS should track *who* alters the disposition of *what* Content and Metadata, as well as *when* he/she does so (i.e., the date and time), *why* and on whose authority.

For example, this could be implemented in the GCCMS using a log or the 'History' field in a Case Profile.

Refer to Mandatory Requirement M50 and the definition for 'Reporting' in Section A.4 of the bid solicitation for further details.

**Question #024****Reference:**

Point-Rated Requirement R51

*The GCCMS should allow a User to configure a Task to correspond to a pre-determined response timeline and milestone, subject to Access Rights.*

**Question #024:**

Could you please provide an example of task milestone?

**Answer #024:**

Point-Rated Requirement R51 has been modified to read: "*The GCCMS should allow a User to configure a Task to correspond to a pre-determined response timeline, subject to Access Rights.*"

**Question #025****Reference:**

Point-Rated Requirement R52

*The GCCMS should allow a User to manage a Task, at least including to create, associate, review, copy, edit, update, action, distribute, assign, re-assign, track, save, auto-forward, by-pass and delete a Task, subject to Access Rights. When a User is tasked with 'reviewing' a Case, he/she is expected to examine the relevant Case and/or Case Object(s) and provide feedback. You might 'distribute' an update on a Task (in a Read-Only format) to several people For Information Only (FYI) (e.g., when no action is expected or required, or when action has already been taken). After soliciting input from a couple of staff members (e.g., on a person's ability or availability to perform a Task in a timely manner), you would 'assign' (or 're-assign') the Task to the most appropriate individual.*

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**Question #025:**

Could you please provide examples of auto-forward and by-pass?

**Answer #025:**

Auto-forward refers to changing the status of a User to 'out-of-office' so that an assigned Task will be forwarded to another User in their absence.

Based on business rules, a User may by-pass one or more control points in an emergency or to meet a fast-approaching deadline.

**Question #026**

**Reference:**

Point-Rated Requirement R65

*The GCCMS should allow a User to create and save audit reports and templates.*

**Question #026:**

Could you please provide an example of a template in this context?

**Answer #026:**

A template is referring to the ability to customize and save report criteria. For example, assume that one criterion in a report called 'Overdue' is 'Assigned To'. A User could set the Value for 'Assigned To' to one that represents his/her team, and save this as a template called 'My Team Overdue'.

**Question #027**

**Reference:**

Point-Rated Requirement R69

*The GCCMS should allow a User to sort multiple (i.e., a variety of) reports, based on the selected criteria.*

**Question #027:**

Do you mean sorting the list of reports or the data within the report? Could you please provide examples?

**Response #027:**

Point-Rated Requirement R69 refers to sorting a list of available or relevant reports (e.g., in alphabetical order) for reference purposes. The ability to sort data in a report is addressed in Point-Rated Requirement R67.

**Question #028**

**Reference:**

Point-Rated Requirement R72

*The GCCMS should allow a User to import, configure, run, view, print, save and export a report in its native format, and in a standard format.*

**Question #028:**

What do you mean by native format compared to standard format?

**Answer #028:**

'Native' format refers to the report structure itself. This should allow reports to be shared by several Departments. Some queries may need to be refined to work with varying schemas.

'Standard' format refers to a User running a report and saving the results in a common file format (e.g., PDF, Excel or a Comma-Separated Value file).

### Question #029

**Reference:**

Point-Rated Requirement R74

*The GCCMS should allow text-based Metadata Elements to have at least 500 characters.*

**Question #029:**

Do you include in 'text-based Metadata Elements' fields such as 'First Name', 'Last Name', 'Tracking-Id', or is this only for fields such as 'Notes' and 'Subject'?

**Answer #029:**

This is referring to any text-based field.

### Question #030

**Reference:**

Point-Rated Requirement R78

*The GCCMS should allow a User to conduct a keyword Search and receive the results in both Canadian English and Canadian French.*

**Question #030:**

Do you mean receiving the results simultaneously in French and English, or that the User can easily (immediately) switch between English and French while viewing the results?

**Answer #030:**

This requirement is referring to the ability to easily switch between English and French while viewing the results, without having to redo the search.

### Question #031

**Reference:**

Point-Rated Requirement R79

*The GCCMS should allow a User to conduct a free text Search and receive the results in both Canadian English and Canadian French.*

**Question #031:**

Do you mean receiving the results simultaneously in French and English, or that the User can easily (immediately) switch between English and French while viewing the results?

**Answer #031:**

This requirement is referring to the ability to easily switch between English and French while viewing the results, without having to redo the search.

**Question #032****Reference:**

Point-Rated Requirement R88

*The GCCMS should allow a System Administrator to restrict Content that can be imported into the system (e.g., by document type, security classification, file type, file extension and file size).*

**Question #032:**

Is file type defined by the file extension (e.g., the file type is MS Word because the file extension is .doc)?

**Answer #032:**

Yes, the file extension reflects the file type.

**Question #033****Reference:**

Point-Rated Requirement R91

*The GCCMS should allow a System Administrator to control access by an external search engine for indexing. Self-explanatory (e.g., for departmental security and data integrity purposes). The GCCMS could expose an access control mechanism (e.g., via an API) that would cause (force) an external search engine to respect the inherent access controls.*

**Question #033:**

Is the external search engine indexing files or Metadata or both? Could you please provide examples of what inputs and what outputs the API would receive and send.

**Answer #033:**

The external search engine should index Metadata and files.

The implementation details of the API are the responsibility of the Vendor. For example, if the product is compatible with Google Search, it should interface where necessary to enable a functional Google Search.

**Question #034****Reference:**

Point-Rated Requirement R94

*The GCCMS should allow a User, Administrator or System Administrator to perform bulk changes to Access Rights for Content and Metadata, based on their Role.*

**Question #034:**

Will this bulk update feature update the access rights of the user or will this bulk update feature update the security of metadata elements?

**Answer #034:**

The following Use Cases should be sufficient to allow Vendors to respond to the Point-Rated Requirement R94 as worded.

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Use Case 1:

The Custodian of 20 Cases will be away on vacation. He/she decides to grant access to these cases to his/her replacement.

Use Case 2:

The Administrator of Ministerial Correspondence (MC) Cases removes access to all 'Draft Response' Case Items from a particular group in the Department.

**Question #035**

**Reference:**

Point-Rated Requirement R95

*The GCCMS should allow a User to view the file properties and path of Content.*

**Question #035:**

Would 'path of Content' include a file system path?

**Answer #035:**

Correct.

**Question #036**

**Reference:**

Point-Rated Requirement R97

*The GCCMS should integrate with a third-party enterprise search engine, such as Autonomy, Google and FAST.*

**Question #036:**

Will the GCCMS interface be used to execute searches (as opposed to the third-party interface)? What specific data is indexed by these third-party search engines?

**Answer #036:**

No. The third-party search engine would perform searches based on indexed data. Data includes Metadata Values as well as the documents themselves.

**Question #037**

**Reference:**

Point-Rated Requirement R98

*The GCCMS should integrate with scanning products and software.*

**Question #037:**

Could you please provide details on what information is exchanged between the scanning product and the GCCMS, and what business scenario is covered by this feature?

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**Answer #037:**

A User should be able to click a button that says 'Import from Scanner'. This would pop up a native (i.e., Windows TWAIN) scanning dialog. When the scan is completed, the data would return to the application. This eliminates scanning and saving documents separately before importing them.

**Question #038**

**Reference:**

Point-Rated Requirement R99

*The GCCMS should be able to extract, categorize and index an email message header (i.e., the Originator, Recipient, Date and Subject Line), the body of an e-mail message in HTML and plain text formats, and attachments in their native format.*

**Question #038:**

Could you please provide a list of native email message formats?

**Answer #038:**

There is no list. The format of an email attachment should be saved in the system as-is, regardless of the format. If the attachment is a PDF file, it should be saved as a PDF file. If it is a .doc file, it should be saved as such.

Bidders should also refer to the revised wording for Mandatory Requirement M74 and Point-Rated Requirement R66.

**Question #039**

**Reference:**

Point-Rated Requirement R104

*The GCCMS should provide the User a single, standardized view of Case Metadata Elements for the lifecycle of the Case, at least including Unique ID, Title, Description, Dates, Priority, Security and Signature.*

**Question #039:**

Please provide an example of a Metadata Value for a 'Signature' Metadata Element?

**Answer #039:**

An example could be a free text field for 'Signature' in which a User enters the name of the person who signs the document.

Also see Point-Rated Requirement R109 which refers to digital signatures.

**Question #040**

**Reference:**

Point-Rated Requirement R107

*The GCCMS should indicate a security level requirement using a Metadata Element. Some Case Objects may have a SECRET rating that would prevent a User who does not have the required clearance from viewing the Object. The User should be provided a standard, system-generated screen that at least includes the Unique ID, Title, Description, Bring Forward and Due dates, Priority, Security, Signature and Lead Sector. The Metadata Element value in the Security field would flag the level of security associated with a given Task or record. Data in the Security field would be compared to and validated by the security level specified in the user account.*

**Question #040:**

Should a User who lacks the appropriate clearance level be able to view and edit Case Object Metadata, but not view the file, or would they only get a Read-Only Metadata view?

**Answer #040:**

No. If a User is not cleared to the required level, he/she should be limited to Read-Only access to Case Metadata.

**Question #041****Reference:**

Mandatory Requirement M7

*The GCCMS must allow a User to bulk import and export Content to facilitate a mail-in or write-in campaign.*

**Question #041:**

Could you please provide examples to differentiate between a mail-in and write-in campaign?

**Answer #041:**

Mandatory Requirement M7 has been modified to read: "The GCCMS must allow a User to bulk import and export Content to facilitate a mail-in campaign."

**Question #042****Reference:**

Mandatory Requirement M70

*The GCCMS must integrate with OpenText API (and other repositories when OpenText API is not integrated) to manage all Case Objects. From a User perspective, the integration must be seamless and succinct. At a minimum, the integration must allow the User to perform the following tasks with a minimum number of keystrokes and/or mouse clicks:*

- *Attach references or copies of documents from the EDRMS to the GCCMS*
- *Save and attach documents generated from the GCCMS into the EDRMS and*
- *Email references or copies of EDRMS documents attached to a GCCMS Case Object.*

**Question #042:**

Could you please provide a list of other repositories that require integration?

**Answer #042:**

Other repositories that may require integration include, but are not limited to GCDOCS (OpenText Content Server) and RDIMS (OpenText eDOCS DM).

**Question #043**

**Reference:**

Mandatory Requirement M71

*The GCCMS must be able to use dynamic links to work with electronic documents and email stored in OpenText API (and other repositories when OpenText API is not integrated).*

**Question #043:**

Could you please define a 'dynamic link'? Are the document and email stored in the API, or is this incorrectly worded?

**Answer #043:**

Mandatory Requirement M71 has been modified to read: "*The GCCMS must be able to use dynamic links to work with electronic documents and email stored in an EDRMS.*

*For example, if a document entitled 'Briefing Note' is a Case Item attached to a Case, a User should be able to click on this document to open it without having to enter the EDRMS and search for the document."*

**Question #044****Reference:**

Mandatory Requirement M74

*The GCCMS must work with Microsoft Outlook.*

**Question #044:**

Please provide examples of what specific functionality is required? Which version of Outlook?

**Answer #044:**

A User should be able to click on an email message in Microsoft Outlook 2007 or greater, and export it to the GCCMS with the click of a button. Bidders should refer to Point-Rated Requirement R99 for additional information.

**Question #045****Reference:**

Point-Rated Requirement R75

*The GCCMS should allow a System Administrator to bulk import Metadata Elements, business rules, drop-down entries for specific fields, EDRMS and non-EDRMS attachments; reports, Crystal Reports and templates from one or more external repositories to facilitate data migration.*

**Question #045:**

Could you please provide an example of a business rule that could be imported, and an example of the source system from which it might come. Please provide examples of "Metadata Elements" that could be imported.

**Answer #045:**

This Point-Rated Requirement addresses the migration of data from a system currently in use by a department to the proposed solution. Bulk importing reduces the work involved in setting up the new system.

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#### Question #046

**Reference:**

Point-Rated Requirement R105

*The GCCMS should allow the User to create and save other configurable views of Case Metadata Elements.*

**Question #046:**

Could you please explain how a User can create his/her own view when Point-Rated Requirement R104 stipulates that the GCCMS must provide the User a standardized view?

**Answer #046:** Point-Rated Requirement R105 refers to the ability to create a different view, or configure the standardized view (defined in accordance with Point-Rated Requirement R104) at a User level.

#### Question # 047

**Reference:**

Mandatory Requirement M13

*The GCCMS must work with database management systems, including, but not limited to Oracle and SQL Server.*

**Question #047:**

Would the Crown please confirm that the licenses for the underlying database management system for the GCCMS will be provided by the Government of Canada and can be utilized with the proposed Government of Canada Correspondence Management System?

**Answer #047:**

Canada confirms that the licenses for the underlying database management system for the GCCMS will be provided by the Government of Canada.

#### Question # 048

**Reference:**

*3.3 Section II part (b) of the Bid Solicitation*

**Question #048:**

Canada indicates that all required components be included in the bidders pricing proposal. Would Canada please confirm that the Government of Canada will provide the underlying operating system and underlying database management system?

**Answer #048:**

Confirmed.

#### Question # 049

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**Reference:**

3.3 Section II part (b) of the Bid Solicitation

**Question #049:**

Canada indicates that all required components be included in the bidders pricing proposal. Would Canada please confirm that all hardware (equipment and cabling for example) are excluded from this bid as such would be provided by Shared Services or by the individual department?

**Answer #049:**

Confirmed.

**Question # 050**

**Reference:**

Bid Solicitation Document

**Question #050:**

Would Canada be able to provide a version of the RFP document (including all Annexes, Forms and Attachments) in MS Word to assist bidders in responding and publishing tasks?

**Answer #050:**

A working version in MS Word of the following documents can be made available to Bidders upon request:

- Annex A
- Annex B
- Annex C
- Form 1
- Form 2
- Form 3
- Form 4

**Question # 051**

**Reference:**

Appendix 1, Mandatory Requirement M80

*The Bidder must have extensive experience completing individual and simultaneous CMS implementation projects of this size and complexity, both on time and on budget.*

*Simultaneous projects are defined as two or more CMS (or equivalent enterprise business application) implementation projects completed simultaneously (i.e., when there was 2-6 months or more of overlap between the start and end dates of each project).*

*The Bidder must also provide verifiable evidence that it has a positive track record rolling out a CMS solution across Canada, and providing task-based training and technical support to clients with a minimum of 500 users.*

**Question #051:**

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Would Canada allow for the bidder to reference CMS solutions outside of Canada i.e. USA, Europe, Australia? Also, would Canada reduce the number of users to 300 to enable more potential bidders to meet this requirement?

**Answer #051:**

Canada accepts to change Mandatory Requirement M80 to allow for the bidder to reference CMS solutions outside of Canada.

The third paragraph in Mandatory Requirement M80 has been revised to read: "*The Bidder must also provide verifiable evidence that it has a positive track record rolling out a CMS solution to Users in multiple, geographically-dispersed locations, and providing task-based training and technical support to Clients with a minimum of 500 Users.*"

Canada will not reduce the minimum number of users.

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