Appendix 1 - Online Auctioning Service Solution Statement of Requirement

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
		Solution Overview			
CASS-1	M at go-live	The solution must provide a publicly accessible web-based graphical user interface (GUI) for all potential buyers to browse, search and display Live and historic Sales Listings and register a new Customer account without requiring a login.	5		
CASS-2	M at go-live	The solution must provide a web-based graphical user interface (GUI) for GCSurplus users, requiring a secure login and password for GCSurplus users to access their GCSurplus user account and assigned GCSurplus user solution functionality.	5		
CASS-3	M at go-live	The solution must provide a web-based graphical user interface (GUI) for Client users requiring a secure login and password for Client users to access their Client user account and assigned Client user functionality.	5		
CASS-4	M at go-live	The solution must provide a web-based graphical user interface (GUI) for Customer users requiring a secure login and password for Customer users to access their Customer user account and assigned Customer user functionality.	5		
		Functionality for Sales of Vehicle and Non-Vehicle Assets			
		Process Sales Request			
PSR-1	M at go-live	The solution must provide the functionality for Client users to create Sales Requests (SRs) to provide defining information about and declare surplus assets (Items) to GCSurplus for eligibility for sale.	5		
PSR-1.1	M at go-live	Functionality PSR-1 must provide the functionality to maintain a discrete record for each Item declared in an SR, allowing for one to one sales and management of all information and all actions taken in the solution at the Item level. This functionality must provide functionality for both of the following scenarios: a) Allow only one (1) Item to be defined and declared in a single SR *[e.g. a single guitar can be defined and declared in an SR]* ; and b) Allow multiple quantities of the same type of Item(s) (i.e. a "Lot") to be defined individually and declared together in a single SR. This functionality must not provide the functionality for Client users to define and declare Items from multiple commodity groups or sub-commodity groups in the same SR. *[e.g. multiple guitars could be defined differently and declared in the same SR, but multiple musical instruments would require separate SRs].* This functionality must provide the functionality to easily copy or re-use and modify defining information about an Item input in an SR to create a separate SR OR to “add another Item” to a created SR and easily copy or re-use and modify the new Item's associated defining information to the same SR.	5		

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PSR-1.1 .1	M at go-live	The solution must provide an implementation of workflow and functionality for interdepartmental sales (transfer) of surplus assets (introduction of a new business process for GC Surplus). The solution must allow GCSurplus users and Client users to define, declare and dispose of surplus assets via interdepartmental transfer processes (e.g. to other government departments or public sector organizations). This functionality is anticipated to be designed as a two-stage sale process: - The “first step" being a restricted public sector sale that would limit views and bidding on a published Sales Listing to some or all Client users of the OAS Solution for a configurable period of time. - As a "second step", in the event the item is not sold under this restricted listing, the Sales Listing would then be open to bidding by the general public. This functionality is anticipated to include providing the transfer of funds (e.g. Payment) between government departments to complete inter-departmental sales of surplus assets.			
PSR-1.1.2	M at go-live	The solution must provide the functionality to display in detail at the Item level all Item(s) declared in a Lot SR.	5		
PSR-1.1.3	*Desirable*	*The solution should provide the functionality for Client users to identify to GCSurplus a request for two (2) or more Item(s) declared in a Lot SR to be sold together.*	2		
PSR-1.2	M at go-live	Functionality PSR1 must provide the functionality to select from a variety of SR types to input defining information, which must include, at a minimum the following types of SRs: - Vehicle (the solution must provide, at a minimum, 44 Vehicle SR types); - Non-vehicle (i.e. All other assets); - Period Contract (see Period Contracts below).	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
PSR-1.2.1	M at go-live	The solution must provide the functionality to input, modify and view all of the following data for each type of SR, at a minimum: a) Commodity: - Commodity; - Sub-commodity. b) Description: - Quantity (unit default must be '1' for Vehicles); - Unit of Measure (unit default must be '1' for Vehicles); - Asset number; - Suggested Minimum Bid amount; - Short Description of Item; - Client observations; - Special Instructions. c) Properties: - Reference number 1; - Reference number 2 (optional data entry); - Region (allow for option to select a pre-populated default Region or to select an alternate Region for assignment of the SR); - Payment Recipient; - Asset Consignee; - Date Available for Sale; - Contact(s); - Location source (the solution must provide the functionality to autopopulate this field by the user's choice of: selection from a previously populated Client address or by access to a look-up and selection of Consignee code).	5		
PSR-1.2.2	M at go-live	In addition to the requirements identified in PSR-1.2.1 above, the solution must provide the functionality to input, modify and view all of the following data for Vehicle SRs: - Vehicle Type; - Vehicle Identification Number (VIN); and - Associated Vehicle Information (see below). o For Vehicle Types - Cars and Light Trucks, the solution must provide the functionality to select from (1) an option to auto populate subsequent Vehicle Information data fields using data linked to the Vehicle VIN entered and (2) an option to manually override auto population of data and allow for user data entry of the required Vehicle Information. o Where the option for auto population of data is selected, the solution must electronically submit a request to vinQuery.com and receive an XML file containing the Vehicle Information associated with the submitted VIN. The solution must provide the functionality to auto populate the Vehicle Information in the SR and provide options to the user which minimize the additional manual input to the fullest extent possible based on the information available from vinQuery.com. o Where the option to enter Vehicle Information manually is selected, or where there is not an exact match for the Vehicle VIN in vinQuery.com, the solution must provide the functionality to select from pre-populated 'applicable options' or to manually enter the required Vehicle Information (refer to Appendix for a sample Vehicle Sales Request identifying all required Vehicle Information).	5		

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PSR-1.2.3	M at go-live	The solution must provide the functionality to declare asset characteristics associated with the Item(s) declared in the SR. This functionality must include at a minimum, declaration of the following characteristics: - Seized item (Y/N) - this functionality is required all Items; - Item in working condition (Y/N) - this functionality is required for a subset of Items based on user identification of commodity group, sub-commodity group or Item name); - Whether the SR contains any Security Requirements (Y/N) - this functionality is required all Items.	5		
PSR-1.2.3.1	*Desirable*	*The solution should provide the functionality for the Client user to identify in the SR whether GCSurplus should arrange for pick-up of the Item from the Client's location or whether the Client has shipped the Item to the GCSurplus Sales Centre.*	2		
PSR-1.2.3.2	*Desirable*	*Functionality PSR-1.2.3.1 should provide the functionality to carry forward data on Client requests for pick-up of Item(s) by GCSurplus, including:* *- The functionality to monitor Client notification of Item shipped and receipt of the shipment by the GCSurplus Sales Centre (see item R&T2.1 below).* *- The functionality for the GCSurplus Sales Officer and Sales Representative users to add a chargeback to the Client's account for pick-up (see item R&T8 below).*	2		
PSR-1.2.4.1	M at go-live	The solution must provide the functionality to attach image files, links to third-party sites, text files (e.g. .doc, .pdf, etc.), and scans of documents (e.g. logs, environmental reports, incident reports, parts lists, etc.) to the SR for transmission to GCSurplus and to retain these records within the solution linked to the Item and the SR.	5		
PSR-1.2.4.2	*Desirable*	*The solution should provide the functionality to attach video files to the SR for transmission to GCSurplus and to retain these records within the system linked to the Item and the SR.*	2		
PSR-1.2.5	M at go-live	The solution must provide the functionality to save SRs in progress ("drafts") and return to the SR at a later point in time to modify and complete the SR.	5		
PSR-1.2.6	M at go-live	The solution must provide the functionality to preview completed SRs prior to transmission [to another Client user] or submission to GCSurplus.	5		
PSR-1.2.7	*Desirable*	*The solution should provide the functionality (configurable on/off by GCSurplus) for workflow by Client users, allowing them to securely transmit an SR to another authorized Client user who may view, modify, comment and re-transmit the SR back to the originating Client user.*	2		
PSR-1.2.8	*M/Future*	The solution must provide the functionality to delete saved draft SRs that are no longer required and have not been submitted to GCSurplus.	5		

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PSR-1.2.9	M at go-live	The solution must provide the functionality to require the Client user to formally certify the asset declaration (SR) (including date and time stamp) prior to its submission to GCSurplus. This functionality must provide the functionality for the Client user to choose not to Certify and return to the detailed SR.	5		
PSR-1.2.10	M at go-live	The solution must provide the functionality for Client users to securely transmit the certified SR and any attached files (see PSR-1.2.4.1 and PSR-1.2.4.2 above) to GCSurplus.	5		
PSR-1.2.11	M at go-live	The solution must provide the functionality to generate a unique GCSurplus.ca identifier that is associated with the SR for the Client user and GCSurplus users to allow for ease of locating and querying information about the SR in the solution.	5		
PSR-1.2.12	M at go-live	The solution must provide a system response to the Client user to confirm the SR has been successfully submitted to and received by GCSurplus.	5		
PSR-1.2.12	*Desirable*	*Functionality PSR-12.12 should provide the functionality for Client users and GCSurplus users to opt to securely transmit the completed SR to additional GoC personnel (e.g. Client materiel manager, etc.) as identified by the originating user. This functionality should allow for secure transmission to other GoC personnel with or without their having a GCSurplus.ca user account.*	2		
PSR-1.2.13	M at go-live	The solution must provide the functionality for GCSurplus users to create SRs on behalf of Clients including all of the required (mandatory) functionality in this section (PSR). This functionality must provide workflow functionality that allows GCSurplus users to securely transmit a completed SR to a Client user for his/her review, approval and Certification of the declaration of surplus assets and to subsequently re-transmit the certified SR to GCSurplus for processing.	5		
PSR-1.2.14	M at go-live	**Client-Initiated Additions to a submitted SR** The solution must provide the functionality for Client users to return to a previously submitted SR and add **additional** attachments and **additional** information and to re-submit the SR to GCSurplus with all additions readily identified. This functionality must maintain a full audit trail of the originally submitted SR and new data entry. This functionality must not provide the functionality for Client users to **change** previously input information (see PSR-1.2.15 below).	5		
PSR-1.2.15	M at go-live	**Client-initiated Amendments Requests to a submitted SR** After an SR has been Certified by the Client user and submitted to GCSurplus for processing, in order to maintain the data integrity of the submitted SR, the solution must provide the functionality for the Client user to create, save and submit requests for an Amendment to GCSurplus to update any data in the solution related to the SR and its associated Items. This functionality must provide the functionality for the Client to communicate within the solution with GCSurplus to easily identify the specific change(s) requested to the submitted SR. ***Note:*** *currently this functionality is provided to Client users in GCSci by making a 'copy' of the submitted SR, allowing Client users to modify the copy and submitting the copy to GCSurplus with a free-form text entry explanation of changes requested, while retaining the original record of the SR within the system.* This functionality must provide the functionality for the Client user to formally approve any and all Amendment request(s) to submitted SRs within the solution. The solution must provide the functionality for all Client approvals to be recorded with date and time stamp together with user id and be fully traceable within the solution.	5		

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PSR-1.2.16	M at go-live	**GCSurplus-initiated Amendment Requests** After an SR has been submitted to GCSurplus for processing, in order to maintain segregation of duties, the solution must provide the functionality for GCSurplus users to identify changes required to data provided by the Client user in an SR and to send a request to the Client to approve an Amendment to the SR. This functionality must provide the functionality for the GCSurplus user to communicate within the solution with the Client user associated with the SR to identify and track the specific change(s) requested to the submitted SR. This functionality must provide the functionality for the Client user to formally approve any and all Amendment request(s) to submitted SRs within the solution. The solution must provide the functionality for all Client approvals to be recorded with date and time stamp together with user id and be fully traceable within the solution.	5		
PSR-1.2.17	M at go-live	**Cancellation of an SR** The solution must provide the functionality for Client users to send a request within the solution to GCSurplus to cancel a submitted SR individually for each Item declared in the SR and for all Items declared in an SR, including the reason for the Cancellation request.	5		
PSR-1.2.18	*M/Future*	The solution must provide the functionality to duplicate or otherwise re-use previously developed SRs as a base to create new SRs for similar Items that can be easily modified and added to. This functionality must manage the new SR and its associated Item(s) as unique entries within the solution. This functionality must be configurable (on/off) by GCSurplus users by type of SR or must only be provided for Non-vehicle SRs.	5		
PSR-2	M at go-live	The solution must provide a **Client user "SR dashboard"** functionality which displays all Client user SRs in an indexed summary form and provides the functionality for the Client user to view details on each SR and action each SR from the "dashboard".	5		
PSR-2.1.1	M at go-live	The SR Dashboard functionality must provide the functionality to sort displayed Client user SRs (including: by Item description, by SR number, by Item reference number, by region, by status).	5		
PSR-2.1.2	M at go-live	The SR Dashboard functionality must provide the functionality to view, modify, re-set, re-save, transmit, print, delete and submit each SR the Client user has created and saved that has not been submitted to GCSurplus.	5		
PSR-2.1.3	M at go-live	The SR Dashboard functionality must provide the functionality to view, transmit, add and submit Additional Information/Attachments, request and submit a request for an Amendment, request and submit a request for a Cancellation, and print each SR the Client user has created and submitted to GCSurplus.	5		

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PSR-2.2	M at go-live	Functionality PSR-2 must provide the functionality for the Client user to identify in real-time the status of all Client user SRs and update in real-time displayed information about the SR and its associated Items based on the Client users and GCSurplus' processing of the SR as a Sales Listing at all points during the sales cycle (from SR to close-out), including: a) SRs saved by Client user; b) SRs submitted to GCSurplus [this must identify the assigned Sales Representative (where applicable) and next action pending]; c) SRs associated with "Live Sales Listing" [this must identify which Item(s) are included in the Sales Listing, the Sales Account, the Assigned Sales Representative, Date of Sales Listing publication, Date of Sales Listing Closing, and status of Sale (i.e. current bid)]; d) SRs associated with a closed Sales Listing (an SR where the Closing date of the Sales Listing has passed and the Item(s) associated to the SR did not sell) [this must identify which Item(s) were included in the Sales Listing, the Sales Account, the Assigned Sales Representative, Date of Sales Listing publication, Date of Sales Listing Closing, and status of each Item included in the Sales Listing]; e) SRs associated with a sold Item [this must identify which Item(s) were included in the Sales Listing, the Sales Account, the Assigned Sales Representative, Date of Sales Listing Closing, Amount of Sale and any Action required]. Statuses must include Payment pending; Paid in full; Picked-up; f) SRs associated with a scrapped Item [this must identify which Item(s) were scrapped, including for each Item, the Item description, Item reference number, Date Item was scrapped, declared Quantity of Item, Quantity of Item scrapped, and reason for Scrapping the Item]; and g) Cancelled SRs [this must identify which Item(s) were included and the date of Cancellation].	5		
PSR-2.3	M at go-live	Functionality PSR-2 must provide the functionality for Client users to view and track the status of submitted SRs within their organization at tiered access levels and nationally, including at a minimum: - status of all SRs by Client user; - status of all SRs by Client user group(s) [to be defined by GCSurplus]; - status of all SRs by Client department. It is anticipated that the following user roles and privileges will be assigned to Client user types: - Client user - Officer - functionality to create, manage and report on all SRs created by the individual user; - Client user - Manager - functionality to view and report on all SRs created by Client users who declared this individual user as their Manager; - Client user - Director - functionality to view and report on all SRs created by Officers and Managers assigned to the individual user as their Director (identified by consignee code selected by the user). This functionality must provide the option that once a Client user (Officer or Manager) is assigned to one (1) Director level Client user that the individual Officer(s) or Manager(s) cannot be selected by another Director level Client user. This functionality must allow for override of this constraint by GCSurplus.			
PSR-2.4	M at go-live	When displaying SRs associated with a Live Sales Listing in the SR Dashboard, the solution must provide the functionality for the Client user to select and display the Live Sales Listing(s) associated with each of the Items declared in the SR.			

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PSR-2.5	M at go-live	The SR Dashboard functionality must identify in real-time the next action pending on all of the Client user's SRs (including actions pending by GCSurplus and actions pending for the Client. For actions pending for the Client the dashboard must provide the functionality for the Client user to access and perform the action.	5		
PSR-2.6	M at go-live	The SR Dashboard functionality must provide the functionality to search and display indexed search results from the Client user's SRs (including search: by Commodity, by Sub-Commodity, by Item reference number, by SR number, by boolean or keyword search, by status).	5		
PSR-2.6.1	M at go-live	The solution must provide the functionality for Client users to return to their Client user "SR dashboard" at any time during their GCSurplus.ca session without losing other work in progress.	5		
PSR-2.6.2	M at go-live	The solution must provide the functionality for Client users to toggle the number of SRs to be displayed in a single window of search results at any one time.	5		
PSR-2.6.3	M at go-live	The solution must provide the functionality to display the total number of records as well as the number of records displayed in the open window and number of records filtered by the solution in all search results.	5		
PSR-3	*Desirable*	*The solution should provide functionality to provide decision support or tool tips (e.g. electronic alerts, look-ups, prompts, instructions, etc.) to assist Client users and GCSurplus users in accurately and quickly completing SRs based on business rules.*	2		
		Assign Sales Request			
ASR-1	M at go-live	The solution must provide a "**Sales Officer Dashboard**" functionality for GCSurplus Sales Officer users in each Region to manage all Sales Requests (SRs) submitted by Clients associated with the Sales Officer user's Region, including the functionality to view, save, print, transmit, and action the SRs.	5		
ASR-1.1	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to view a summary of all SRs associated with the Region, including at a minimum the following information for each SR: SR Number, Consignee, Item description, Commodity (if assigned), Minimum Bid Amount.	5		
ASR-1.1.1	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to view all data contained within the SR as originally submitted to GCSurplus (see PSR-1 above).	5		
ASR-1.2	*Desirable*	*Functionality ASR-1 should provide the functionality for GCSurplus Sales Officer users to confirm or change the Commodity and Minimum bid amount for each Item identified in the submitted SR. In order to maintain data integrity and segregation of duties, if this functionality is provided all modifications to data within a submitted SR must be date and time stamped with user ID and the solution must maintain the original record of the SR within the solution in addition to the modified version.*	2		
ASR-1.3	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to view Item details for each and for all Items associated with an SR. This must include at a minimum, the number of Items contained in the SR and for each Item record, the quantity and description of the Item.	5		

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ASR-1.4	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to assign and re-assign the SR to a Sales Representative within their Region.	5		
ASR-1.4.1	*Desirable*	*Functionality ASR-1 should provide the functionality for GCSurplus Sales Officer users to choose to automate assignment OR to manually assign SRs to Sales Representatives within the solution, based on configurable business rules (e.g. by location, by Client, by Commodity, by Workload, etc.).*	2		
ASR-1.5	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to view Additional Information /Additional Files submitted by a Client associated with the SR.	5		
ASR-1.6	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to contact the Client user associated with the SR within the solution.	5		
ASR-1.7	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to prepare and send to the originating Client user a request to amend the SR (see PSR-1.2.16 above).	5		
ASR-1.8	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to view Amendment Request details for Amendment Requests submitted by Clients that are associated with an SR (see PSR-1.2.15 above). This must include at a minimum the number of Amendment Requests, and for each Amendment Request record the Description of the Amendment, Quantity of the Item prior to Amendment, Amendment date; and Reason for the Amendment.	5		
ASR-1.8.1	M at go-live	Functionality ASR-1.8 must provide the functionality for GCSurplus Sales Officer users to action the Amendment Request submitted and certified by the Client user. This functionality must include, at a minimum: - Option to open and import new data to modify a Sales Listing in progress and Option to cancel a Sales Listing associated with an Item from the SR if the Sales Listing is in progress (refer to Initiate Sales Listing below); - Option to cancel the Sales Listing associated with an Item from the SR if the Sales Listing is live at the time of the amendment request (refer to Finalize Sales Listing below); - Option to cancel a Sale for the item if the Sales Listing associated with an Item from the SR has closed but the Item has not yet been paid for or picked up (refer to Closed Listing below); - Option to issue a "chargeback" to the Client's account (refer to R&T-8 below).	5		
ASR-1.9	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to view Scrapped Item details for any Scrapped Items associated with the SR. This must include at a minimum the number of Scrapped Items, and for each Scrapped Item record the Description, Quantity of Scrap, Scrap Date, and Reason for Scrapping the Item.	5		
ASR-1.10	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to close an SR (if all items have been Sold or Scrapped).	5		
ASR-1.11	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to view Client submitted requests to Cancel an SR (see PSR-1.2.17 above).	5		

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ASR-1.12	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus user to cancel an SR for a client (see PSR-1.2.17 above). This solution must retain the original record and all data of the submitted SR within the solution and must record and track all cancelled SRs. This functionality must include, at a minimum: - Option to cancel a Sales Listing associated with an Item from the SR if the Sales Listing is in progress (refer to Initiate Sales Listing below); - Option to cancel the Sales Listing associated with an Item from the SR if the Sales Listing is live at the time of the amendment request (refer to Finalize Sales Listing below); - Option to cancel a Sale for the item if the Sales Listing associated with an Item from the SR has closed but the Item has not yet been paid for or picked up (refer to Closed Listing below); - Option to issue a "chargeback" to the Client's account (refer to R&T-8 below).	5		
ASR-1.13	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to enter or display comments previously entered in an SR.	5		
ASR-1.14	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to copy an SR to use as a base to create a new SR (see PSR-1.2.13 above).	5		
ASR-1.15	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to enter or modify Payment Recipient and Consignee information associated with an SR and with each Item in the SR.	5		
ASR-1.16	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to enter or modify Asset location information.	5		
ASR-1.17	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to change the assignment of the SR to an alternate GCSurplus Region.	5		

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ASR-1.18	M at go-live	Functionality ASR-1 must provide the functionality for the GCSurplus Sales Officer user to identify in real-time the status of all SRs for the selected Region and must update in real-time displayed information about each SR and its associated Items based on the Client users and GCSurplus' processing of the SR as a Sales Listing at all points during the sales cycle (from SR to close-out), including: a) SRs submitted to GCSurplus [this must identify the assigned Sales Representative (where applicable) and next action pending]; b) SRs returned to Client for approval of an Amendment. This status must identify the SR as "unsubmitted" and not allow GCSurplus to action the SR until the Client has returned an approved SR; c) SRs associated with "Live Sales Listing" [this must identify which Item(s) are included in the Sales Listing, the Sales Account, the Assigned Sales Representative, Date of Sales Listing publication, Date of Sales Listing Closing, and status of Sale (i.e. current bid)]; d) SRs associated with a closed Sales Listing (an SR where the Closing date of the Sales Listing has passed and the Item(s) associated to the SR did not sell) [this must identify which Item(s) were included in the Sales Listing, the Sales Account, the Assigned Sales Representative, Date of Sales Listing publication, Date of Sales Listing Closing, and status of each Item included in the Sales Listing]; e) SRs associated with a sold Item [this must identify which Item(s) were included in the Sales Listing, the Sales Account, the Assigned Sales Representative, Date of Sales Listing Closing, Amount of Sale and any Action required]; f) SRs associated with a scrapped Item [this must identify which Item(s) were scrapped, including for each Item, the Item description, Item reference number, Date Item was scrapped, declared Quantity of Item, Quantity of Item scrapped, and reason for Scrapping the Item]; and g) Cancelled SRs [this must identify which Item(s) were included and the date of Cancellation].	5		
ASR-1.18.1	M at go-live	The solution must provide the functionality to GCSurplus to view and track the status of all SRs in real-time. This functionality must be accessible at tiered access levels by Region with access to all SRs associated with their Region, and must be accessible by GCSurplus HQ with access to all SRs in all Regions. At a minimum, this must include the ability to view: - status of all SRs by Client; - status of all SRs by assigned Sales Representative; - status of all SRs by Client consignee; - status of all SRs by other user group(s) [to be defined by GCSurplus]; and - status of all SRs by Region (for GCSurplus HQ).			
ASR-1.19	M at go-live	The Sales Officer Dashboard functionality must provide the functionality to toggle views of the Region's SRs to view only SRs of a selected Status. This functionality must include the functionality to view "All" SRs for the Region as well as the functionality to view only those SRs associated with a status selected by the GCSurplus Sales Officer user (see ASR-1.18 above).			
ASR-1.20	M at go-live	When displaying SRs associated with a Live Sales Listing, Functionality ASR-1 must provide the functionality for the GCSurplus Sales Officer user to select and display the Live Sales Listing(s) associated with each of the Items declared in the SR.	5		

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ASR-1.21	M at go-live	Functionality ASR-1 must provide the functionality to identify in real-time the next action pending on all of the Region's SRs (including actions pending by GCSurplus and actions pending for the Client). For actions pending for the GCSurplus Sales Officer Functionality ASR-1 must provide the functionality for the GCSurplus Sales Officer user to access and perform the action).	5		
ASR-1.22	M at go-live	Functionality ASR-1 must provide the functionality to look-up and search and display indexed search results from the Region's SRs (including look-up and search: by Commodity, by Sub-Commodity, by Item reference number, by SR number, by Consignee Code, by assigned Sales Representative, by boolean or keyword search, by status, and by date (e.g. created within the last x months)].	5		
ASR-1.23	M at go-live	Functionality ASR-1 must provide the functionality to sort displayed SRs (including: by Item description, by SR number, by Item reference number, by region, by status).	5		
ASR-1.24	M at go-live	Functionality ASR-1 must provide the functionality to toggle the number of SRs to be displayed in a single window at any one time.	5		
ASR-1.25	M at go-live	Functionality ASR-1 must provide the functionality to display the total number of records as well as the number of records displayed in the open window and number of records filtered by the solution in any and all search results.	5		
ASR-1.26	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users to return to their "Dashboard" at any time during their GCSurplus.ca session without losing other work in progress.	5		
ASR-1.27	M at go-live	Functionality ASR-1 must provide the functionality for GCSurplus Sales Officer users (with access rights) to select an alternate Region within their window and to perform all of the same functions on SRs active within the newly selected Region.	5		
ASR-2	M at go-live	The solution must provide a "**Sales Representative Dashboard**" functionality for GCSurplus Sales Representative users in each Region to manage all Sales Requests (SRs) submitted by Clients and assigned to the associated GCSurplus Sales Representative user, including the functionality to view, save, print, transmit, and action the SRs.	5		
ASR-2.1	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to view a summary of all SRs assigned to them, by Region, including at a minimum the following information for each SR: SR Number, Consignee, Item description, Commodity (if assigned), Minimum Bid Amount.	5		
ASR-2.2	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to view all data contained within the SR as originally submitted to GCSurplus (see PSR-1 above).	5		
ASR-2.3	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to confirm or change the Commodity and Minimum bid amount for each Item identified in a submitted SR. In order to maintain data integrity and segregation of duties, all modifications to data within a submitted SR must be date and time stamped with user ID and the solution must maintain the original record of the SR within the solution in addition to the modified version.	5		
ASR-2.4	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to view Item details for each and for all Items associated with an SR. This must include at a minimum, the number of Items contained in the SR and for each Item record, the quantity and description of the Item.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
ASR-2.5	*Desirable*	*Functionality ASR-2 should provide the functionality for GCSurplus Sales Representative users to transfer the assignment of an SR to another Sales Representative (e.g. due to the Sales Representative's temporary unavailability).* *If this functionality is provided, when a Sales Listing associated with an assigned SR is Live, the solution must provide the functionality to update the Contact Information in the Live Sales Listing to the newly assigned Sales Representative.*	2		
ASR-2.6	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to view Additional Information /Additional Files submitted by a Client associated with the SR.	5		
ASR-2.7	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to contact the Client user associated with the SR within the solution.	5		
ASR-2.8	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to prepare and send to the originating Client user a request to amend the SR (see PSR-1.2.16 above).	5		
ASR-2.9	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to view Amendment Request details for Amendment Requests submitted by Clients that are associated with an SR (see PSR-1.2.15 above). This must include at a minimum the number of Amendment Requests, and for each Amendment Request record the Description of the Amendment, Quantity of the Item prior to Amendment, Amendment date; and Reason for the Amendment.	5		
ASR-2.9.1	M at go-live	Functionality ASR-2.9 must provide the functionality for GCSurplus Sales Representative users to action the Amendment Request submitted and certified by the Client user. This functionality must include, at a minimum: - Option to open and import new data to modify a Sales Listing in progress and Option to cancel a Sales Listing associated with an Item from the SR if the Sales Listing is in progress (refer to Initiate Sales Listing below); - Option to cancel the Sales Listing associated with an Item from the SR if the Sales Listing is live at the time of the amendment request (refer to Finalize Sales Listing below); - Option to cancel a Sale for the item if the Sales Listing associated with an Item from the SR has closed but the Item has not yet been paid for or picked up (refer to Closed Listing below); - Option to issue a "chargeback" to the Client's account (refer to R&T-8 below).	5		
ASR-2.10	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to view Scrapped Item details for any Scrapped Items associated with the SR. This must include at a minimum the number of Scrapped Items, and for each Scrapped Item record the Description, Quantity of Scrap, Scrap Date, and Reason for Scrapping the Item.	5		
ASR-2.11	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to close an SR (if all items have been Sold or Scrapped).	5		
ASR-2.12	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to view Client submitted requests to Cancel an SR (see PSR-1.2.17 above).	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
ASR-2.13	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Representative users to cancel an SR for a client (see PSR-1.2.17 above). This solution must retain the original record and all data of the submitted SR within the solution and must record and track all cancelled SRs. This functionality must include, at a minimum: - Option to cancel a Sales Listing associated with an Item from the SR if the Sales Listing is in progress (refer to Initiate Sales Listing below); - Option to cancel the Sales Listing associated with an Item from the SR if the Sales Listing is live at the time of the amendment request (refer to Finalize Sales Listing below); - Option to cancel a Sale for the item if the Sales Listing associated with an Item from the SR has closed but the Item has not yet been paid for or picked up (refer to Closed Listing below); - Option to issue a "chargeback" to the Client's account (refer to R&T-8 below).	5		
ASR-2.14	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to enter or display comments previously entered in an SR.	5		
ASR-2.15	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to copy an SR to use as a base to create a new SR (see PSR-1.2.13 above).	5		
ASR-2.16	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to enter or modify Payment Recipient and Consignee information associated with an SR and with each Item in the SR.	5		
ASR-2.17	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to enter or modify Asset location information.	5		
ASR-2.18	M at go-live	Functionality ASR-2 must provide the functionality for the GCSurplus Sales Representative user to identify in real-time the status of all SRs assigned to the Sales Representative, by Region, and must update in real-time the displayed information about each SR and its associated Items based on the Client users and GCSurplus' processing of the SR as a Sales Listing at all points during the sales cycle (from SR to close-out), including: a) SRs submitted to GCSurplus [this must identify the next action pending for each SR]; b) SRs returned to Client for approval of an Amendment. This status must identify the SR as "unsubmitted" and not allow GCSurplus to action the SR until the Client has returned an approved SR; c) SRs associated with "Live Sales Listing" [this must identify which Item(s) are included in the associated Sales Listing(s), the Sales Account, the Assigned Sales Representative, Date of Sales Listing publication, Date of Sales Listing Closing, and status of Sale (i.e. current bid)]; d) SRs associated with a closed Sales Listing (an SR where the Closing date of the Sales Listing has passed and the Item(s) associated with the SR did not sell) [this must identify which Item(s) were included in the Sales Listing, the Sales Account, the Assigned Sales Representative, Date of Sales Listing publication, Date of Sales Listing Closing, and status of each Item included in the Sales Listing]; e) SRs associated with a sold Item [this must identify which Item(s) were included in the Sales Listing, the Sales Account, the Assigned Sales Representative, Date of Sales Listing Closing, Amount of Sale and any Action required]; f) SRs associated with a scrapped Item [this must identify which Item(s) were scrapped, including for each Item, the Item description, Item reference number, Date Item was scrapped, declared Quantity of Item, Quantity of Item scrapped, and reason for Scrapping the Item]; and g) Cancelled SRs [this must identify which Item(s) were included and the date of Cancellation].	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
ASR-2.19	M at go-live	Functionality ASR-2 must provide the functionality to toggle views of the GCSurplus Sales Representative user's assigned SRs to view only SRs of a selected Status. This functionality must include the functionality to view "All" SRs assigned to the GCSurplus Sales Representative user as a default setting as well as the functionality to view only those SRs associated with a status selected by the GCSurplus Sales Representative user (see ASR-1.18 above).			
ASR-2.20	M at go-live	When displaying SRs associated with a Live Sales Listing, functionality ASR-2 must provide the functionality to select and display the Live Sales Listing(s) associated with each of the Item(s) declared in each SR.			
ASR-2.21	M at go-live	Functionality ASR-2 must provide the functionality to identify in real-time the next action pending on all of the GCSurplus Sales Representative user's assigned SRs (including actions pending by GCSurplus and actions pending for the Client). For actions pending for the GCSurplus Sales Representative, the dashboard must provide the functionality for the Sales Representative user to access and perform the action).	5		
ASR-2.22	M at go-live	Functionality ASR-2 must provide the functionality to look-up and search and display indexed search results from the GCSurplus Sales Representative's assigned SRs [including look-up and search: by Commodity, by Sub-Commodity, by Item reference number, by SR number, by Consignee Code, by boolean or keyword search, by status, and by date (e.g. created within the last X months)].	5		
ASR-2.23	M at go-live	Functionality ASR-2 must provide the functionality to sort displayed SRs (including: by Item description, by SR number, by Item reference number, by region, by status).	5		
ASR-2.24	M at go-live	Functionality ASR-2 must provide the functionality to toggle the number of SRs to be displayed in a single window at any one time.	5		
ASR-2.25	M at go-live	Functionality ASR-2 must provide the functionality to display the total number of records as well as the number of records displayed in the open window and number of records filtered by the solution in any and all search results.	5		
ASR-2.26	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to return to their "Dashboard" at any time during their GCSurplus.ca session without losing other work in progress.	5		
ASR-2.27	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users (with access rights) to select an alternate Region within their window and to perform all of the same functions on SRs active within the newly selected Region.	5		
ASR-2.2	M at go-live	Functionality ASR-2 must provide the functionality for GCSurplus Sales Representative users to create a Sales Listing from the SR. (See Initiate Sales Listing below)	5		
		Receipt and Triage			
R&T-1	M at go-live	The solution must provide the functionality to automatically **create and maintain an inventory** of all surplus assets (at the Item level) declared by Clients in submitted SRs, in a manner which tracks the consignee and Client associated with the Item and its associated SR.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
R&T-1.1	M at go-live	Functionality R&T-1 must provide an inventory control with the functionality to increase or decrement inventory quantities based on any and all of the following actions (at a minimum): - Submission of Item(s) in an SR to GCSurplus; - Approval of an SR prepared by GCSurplus by a Client user; - Amendment(s) requested and approved to previously submitted SRs (whether the Amendment request is initiated by the Client user as identified in PSR-1.2.15 above, or initiated by a GCSurplus user and approved by the Client user as identified in PSR-1.2.16 above); - Validation of shipment(s) received by GCSurplus and any changes noted by GCSurplus (see R&T-2.3.1 below). - Successful sale of an Item and pick-up by Customer; - Scrap of an Item; - Cancellation of an SR; and - Other action to remove an Item from the inventory (e.g. when a Client user requests an item be returned to the Client's inventory, etc.).	5		
R&T-2	M at go-live	The solution must provide the functionality for GCSurplus users to record, track and view the location and movement of all Client Items in the GCSurplus inventory (whether the Item is located at a GCSurplus Sales Centre or a Client location); linked to the Client's submitted SR. This functionality must include the following statuses, at a minimum, including the date, time and user ID associated with the status - Location(s) of Item(s) declared in an SR submitted to GCSurplus; - Initial receipt of an Item in a shipment from a Client to a GCSurplus Sales Centre; - Transfer(s) to other GCSurplus Sales Centres; - Transfer(s) or return(s) to a Client site (including the reason for the return) ; - Shipment(s) to Customer; - Scrap of an Item by GCSurplus (including the reason for scrapping).	5		
R&T-2.1	*Desirable*	*The solution should provide a shipping functionality for GCSurplus Warehouse Coordinator users to input and track pending delivery or shipping date(s) and time(s) for Client Items associated with submitted SRs. This functionality should provide the functionality for the GCSurplus Storeperson to view all shipments pending to their associated GCSurplus Sales Centre (including origin(s) of shipment and delivery date(s) anticipated) and view a daily record of pending deliveries.*	2		
R&T-2.1.1	*Desirable*	*The solution should provide the functionality for Client users to input and track shipment(s) pending to GCSurplus Sales Centres.*	2		
R&T-2.1.2	*Desirable*	*The solution should provide the functionality for Client users to generate, view, store and print an SR Identification Label (e.g. packing slip) for their Item(s) to be included with the shipment to GCSurplus. This should include identification of each Item by SR number included within the shipment.*	2		
R&T-2.2	M at go-live	The solution must provide the functionality for GCSurplus users to record receipt of a shipment from a Client.	5		
R&T-2.2.1	*Desirable*	*The solution should provide the functionality to reconcile shipment data (e.g. A shipment of a 'triwall' containing Items was received at a GCSurplus Sales Centre) with Item-level receipt data (e.g. A specific Item was received in a shipment).*	2		
R&T-2.3	M at go-live	The solution must provide the functionality for GCSurplus users to validate individual Items received in a shipment against their associated SR(s) including the functionality to record Item(s) as received, missing and change(s) to Item information recorded by the Client in their submitted SR (e.g. change in condition, damage during shipment, additional Item(s) included, etc.).	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
R&T-2.3.1	M at go-live	When a variance is identified by GCSurplus, the solution must provide the functionality for the GCSurplus user to unsubmit the Client's submitted SR and request the Client to Amend the SR (see item PSR-15).	5		
R&T-2.4	M at go-live	The solution must provide the functionality for GCSurplus users to "flag" an item in the solution as "high risk" or requiring special handling.	5		
R&T-2.5	*Desirable*	*The solution should provide the functionality for GCSurplus users to record the physical location of an Item within the GCSurplus Sales Centre (e.g. Aisle, Bin number, etc.). If provided, this functionality must be configurable by GCSurplus for Regions to opt in or opt out of this functionality.*	2		
R&T-3	M at go-live	The solution must provide the functionality for GCSurplus users to record a “witness” to the receipt of Item(s). This functionality must be configurable (i.e. ability to turn functionality "on" / "off") based on business rules to be established by GCSurplus (e.g. "on" for identified high risk items, etc.). This functionality (when enabled) must require the witness to be a different GCSurplus user than the original GCSurplus user who received the item(s) and must be provided in a manner that ensures dual integrity of the receiving and witnessing GCSurplus users.	5		
R&T-5	*Desirable*	*The solution should provide the functionality for GCSurplus users and Client users to search and retrieve histories for individual shipments.*	2		
R&T-5.1	*M/Future*	*Functionality R&T-5 should proivde the functionality to search by:* *- Freeform text entry; and* *- A variety of defined fields (e.g. SR number, date of shipment, etc.).*	5		
R&T-6	M at go-live	The solution must provide the functionality to capture and monitor inventory control of all declared Item(s) including at a minimum: - Item location(s) (Regional Sales Centre, Client Site); - Date Item was received by GCSurplus (where applicable, for Item(s) to be sold at a GCSurplus Sales Centre); - Date of submission of associated Client SR; - Date Item was shipped to Customer (where applicable, for Item(s) where shipping to Customer is enabled and selected, refer to LC/P-8 below). This functionality must automatically update information on the Client user's Dashboard for the SR associated with the Item.	5		
R&T-6.1	*Desirable*	*Functionality R&T-6 should provide the functionality to track and display inventory control of all Item(s) including the following:* *- Date Item was shipped by the Client (where entered by the Client) (see item R&T-2.1.1);* *- Date of generation of authorization to rel ease (see item PC-15 below).*	2		
R&T-6.1	*Desirable*	*The solution should provide the functionality to identify and alert GCSurplus users to Inventory control issues, including:* *- "Missing inventory items" (e.g. Item shipped but not yet received); and* *- "Stale inventory items" (e.g. Items received "#" days ago; where the number of days is configurable by GCSurplus).*	2		
R&T-6.2	*Desirable*	*Functionality R&T-6 should provide the functionality to capture and monitor receipt, inventory and shipment data on item(s) within the Regional Sales Centre that do not have an associated SR from a Client (e.g. general warehouse inventory). This functionality should distinguish in all views and reports between inventory of Items declared and received based on Client SRs and "general" warehouse inventory input by GCSurplus users.*	2		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
R&T-7	M at go-live	The solution must provide the functionality to view and report on Item Inventory by Regional Sales Centre to allow GCSurplus users to perform inventory verification. This functionality must provide the functionality for GCSurplus users to record in the solution any variance(s) between inventory reported by the solution and actual inventory counts.	5		
R&T-8	M at go-live	The solution must provide the functionality for GCSurplus users to record a variety of expenses and internal costs associated with processing of an Item (e.g. shipping, towing, appraisal, cleaning, advertisement, etc.).	5		
R&T-8.1	M at go-live	Functionality R&T-8 must provide the functionality for GCSurplus users to assign and track recorded expense(s) and costs recorded against an Item to "charge back" the cost to the Client SR and consignee code associated with the Item, including, at a minimum, the following options: - Charge 100% to GCSurplus ($0 charge to Client, with the functionality to track and report on the costs to GCSurplus associated with processing the Sale); - Charge 100% to Client consignee ($ charge to Client with the functionality to track and report on the costs to GCSurplus associated with processing the Sale); and - Share expense between GCSurplus and Client Consignee, with the functionality for GCSurplus users to identify the proportion of the expense to be assigned to each account.	5		
R&T-8.2	M at go-live	Functionality R&T-8 must provide the functionality to automate approvals for chargebacks through tiers of GCSurplus users together with notifications or alerts to the user of actions required.	5		
		Initiate Sales Listing			
ISL-1	M at go-live	The solution must provide the functionality for GCSurplus Sales Representative users to create a Sales Listing from the SR by automatically creating a copy of all data that was provided in the SR and populating the Sales Listing template, allowing the GCSurplus user to edit data. This functionality must retain a record of the original SR and any Amendments within the solution.	5		
ISL-1.1	M at go-live	The solution must provide the functionality for GCSurplus Sales Representative users to create a Sales Listing which combines two (2) or more Item(s) from across different SRs into a single Sales Listing, while maintaining traceability of all data and activities associated with each Item at the Item level (i.e. traced to the initial SR and consignee). This functionality must be restricted to Items of the same Commodity OR same Consignee code.	5		
ISL-1.2	M at go-live	The solution must provide the functionality for GCSurplus Sales Representative users to divide a single (related) SR with multiple Items into two (2) or more separate Sales Listings while maintaining traceability of all data and activities associated with each Item at the Item level (i.e. traced to the initial SR and consignee). This functionality must be restricted to Items of the same Commodity OR same Consignee code.	5		
ISL-1.3	M at go-live	The solution must provide the functionality to save Sales Listings in progress ("drafts") and return to the Sales Listing at a later point in time to modify and complete the Sales Listing.	*5*		
ISL-1.4	M at go-live	The solution must provide the functionality to preview completed Sales Listings prior to transmission [to another GCSurplus user or to the associated Client user].	5		
ISL-1.5	M at go-live	The solution must provide the functionality (configurable on/off by GCSurplus) for workflow by GCSurplus users, allowing them to securely transmit a Sales Listing to other authorized GCSurplus users who may view, modify, comment and re-transmit the Sales Listing back to the originating GCSurplus user.	5		
ISL-1.6	M at go-live	The solution must provide the functionality to delete saved draft Sales Listings that are no longer required and have not been submitted for QA by other GCSurplus users.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
ISL-7	M at go-live	The solution must provide the functionality for GCSurplus Sales Representative users to add to, delete and modify photos and image files associated with the Item on its associated Sales Listing without undue restriction on file size (maximum 3MB size), number or format.	5		
ISL-7.1	*Desirable*	Functionality ISL-7 should provide the functionality for GCSurplus Sales Representative users to edit photo images (including at a minimum: crop, rotate, flip, adjust contrast, adjust brightness, adjust focus, blur selected parts of the image) within the solution.	2		
ISL-7.2	M at go-live	The solution must provide the functionality for GCSurplus Sales Representative users to select and re-select the “featured photo” to be shown to potential Customers on a Sales Listing and easily add, delete, rotate and re-order the presentation of additional photos on the Sales Listing at any time in creation, review and publication of the Sales Listing as a Live Sales Listing.	5		
ISL-8	*Desirable*	*The solution should provide the functionality for GCSurplus Sales Representative users to add to, delete and modify video files and multimedia files associated with a Sales Listing without restriction on file size (maximum 3MB size), number or format.*	2		
ISL-8.1	*Desirable*	*The solution should provide the functionality for GCSurplus Sales Representative users to add embedded links to video files or third-party videos (e.g. YouTube, 3rd party advertisers, etc.) in a manner compliant with TB Standards to a Sales Listing which can be easily accessed by Customers from within the Sales Listing (e.g. by a click).*	2		
ISL-9	M at go-live	The solution must provide the functionality for GCSurplus Sales Representative users to attach or embed links to third-party sites in a manner compliant with TB Standards within the Sales Listing which can be easily accessed by Customers from within the Sales Listing (e.g. by a click).	5		
ISL-10	*Desirable*	The solution should provide the functionality for GCSurplus Sales Representative users to attach or embed other file types (e.g. scans, .pdfs, etc.) in a manner compliant with TB Standards within the Sales Listing which can be easily accessed by Customers from within the Sales Listing.	2		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
ISL-11	M at go-live	The solution must provide the functionality for GCSurplus Sales Representative users to configure and set conditions and record data about the Sales Listing, including, at a minimum the following: - Choose the Type of Sale (e.g. open or directed see ISL-16 below. This must include an option for Auction Sales, see ISL-17 below); - Choose the Type of Customer (e.g. all or a sub-set of Customers); - Enter the Item Price; - Enter the Minimum bid amount; - Set the duration of bidding period [this functionality must automatically set the Bid closing date and time according to the date the Sales Listing is published Live]; - Identify the allowable method(s) of payment; - Set the conditions of payment; - Assign the appropriate Commission rate(s); - Enable/disable "buy now" option for a Sales Listing (including the ability to set a threshold at which "buy now" would be enabled for the Customer); - Enable/disable "reserve bid" option; - Enable/disable "online shipping" option [this functionality must require the GCSurplus user to enter the dimensions and weight of the Item and to display this data in the Sales Listing] (see item LC/P-8 below); and - Choose between automatically inserting associated terms and conditions based on business rules set by GCSurplus, and allowing GCSurplus users to select from a presented set of clauses to be inserted into the Sales Listing which are presented to the GCSurplus user for selection based on the identified Item characteristics, Client, and Commodity. (e.g. Basel convention clauses to be inserted where Commodity = electronics).	5		
ISL-12	M at go-live	The solution must provide the functionality for GCSurplus Sales Representative users to preview a draft Sales Listing as it would appear to Customers.			
ISL-13	M at go-live	The solution must provide the functionality to duplicate or otherwise re-use previously developed Sales Listings as a base to create new Sales Listings that can be easily modified and added to for new Sales Listings for similar Items AND to Re-list items that have not sold. When this functionality is accessed by the GCSurplus Sales Representative, it must: - Manage new Sales Listings (i.e. for Item(s) which have not been previously included in a Sales Listing as a unique entry within the solution; and - Manage actions and information for any Items which are being re-listed ensuring all actions are recorded, tracked and associated back to the Item and original SR.			
ISL-13.1	M at go-live	Functionality ISL-13 must provide robust search capabilities for GCSurplus Sales Representative users to locate and access the user's own previously developed Sales Listings (e.g. search by Commodity, key word search, etc.) for this purpose.	5		
ISL-13.2	*Desirable*	*Functionality ISL-13 should provide the functionality for GCSurplus Sales Representative to search for text within a previously developed Sales Listing to locate, view and re-use elements of a previously developed Sales Listing (e.g. Clauses, contacts, etc.)*	2		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
ISL-14	M at go-live	The solution must provide the functionality for GCSurplus Sales Representative users to record, store and retrieve within the solution all activity, information and files associated with an Item at the Item level and link all data including correspondence (including: e-mails, scanned files) and actions for an Item back to the original SR and Item. This functionality must include: - The ability for GCSurplus users to record (internal) comments or notes to file on activities associated with the Item; - The ability for GCSurplus users to attach (internal) e-mail files, scanned documents, MS Office files, and .pdfs to the Item record.	5		
ISL-14.1	*Desirable*	*Functionality ISL-14 should provide the functionality to link all files and records attached to an Item to the corresponding Consignee and Client for GCSurplus to record, store, view and print summaries of file status at the Item, consignee and Client levels.*	2		
ISL-15	*Desirable*	*The solution should provide the functionality for GCSurplus Sales Representative users to access a variety of decision support tools (e.g. electronic alerts, look-ups, etc.) to assist GCSurplus users in accurately and quickly completing Sales Listings*	2		
ISL-16	M at go-live	***Directed Sales*** *The solution must provide the functionality for GCSurplus Sales Representative users to create and manage Directed Sales.* *A Directed Sale is not a Live Sales Listing published to GCSurplus.ca. Directed Sales occur as a result of an unsolicited offer to purchase Item(s) in GCSurplus' Inventory.* *This functionality must provide the functionality for GCSurplus Sales Representatives to:* *- Create an SR;* *- Submit the SR to the Client user for approval and submission to GCSurplus;* *- Create the Sales Listing;* *- Save the Sales Listing as a completed Sales Listing within the solution;* *- Award the Sale; and* *- Complete Payment and Reconciliation.*	5		
ISL-17	M at go-live	***Auction Sales*** *The solution must provide the functionality for GCSurplus Sales Representative users to create and manage Auction Sales.* *An Auction Sale is not a Live Sales Listing published to GCSurplus.ca. Auction Sales are a type of "directed sale" transaction whereby GCSurplus sells a number of Item(s) to a licensed Auctioneer. Auctioneer Sales are created by the GCSurplus Sales Representative after the Auctioneer has sold the Items. The amount of the sale recorded in the solution is equal to the payment received by the Auctioneer for subsequent auction of the Item(s), less the value of the Auctioneer's commission as agreed upon by GCSurplus.* *This functionality must provide the functionality for the GCSurplus Sales Representative user to record the Auctioneer's fee/commission (e.g. service charge) associated with the Sales Listing, with 100% of the "chargeback" assigned to GCSurplus.*	5		
		Finalize Listing			
FL-1	M at go-live	The solution must provide the functionality for GCSurplus Sales Representative users to electronically forward prepared Sales Listings to other authorized GCSurplus users for action (e.g. in defined review tiers for QA/QC, audit and approval and translation of Sales Listing text).	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
FL-2	M at go-live	The solution must provide the functionality for the assigned GCSurplus Sales Representative and the individual user's associated Manager to retrieve, modify and re-submit a Sales Listing that has been submitted for any of QA/QC, audit and approval. When this functionality is actioned, the solution must not allow a GCSurplus user who is subsequent in the review process to access the Sales Listing until the GCSurplus user working in the Sales Listing has re-submitted the modified Sales Listing for review.	5		
FL-3	M at go-live	The solution must provide the functionality for authorized GCSurplus users to view, edit and send a prepared Sales Listing back to the previous user for action(s) together with identification of changes required to the Sales Listing.	5		
FL-3.1	*Desirable*	*Functionality FL-3 should provide the functionality for authorized GCSurplus users to identify changes required to the Sales Listing by theme (to be defined by GCSurplus e.g. incomplete, specific details required, error, etc.) and to provide free-form additional comments for feedback to the originating user.*	2		
FL-3.2	*Desirable*	*Functionality FL-3 should provide the functionality for authorized GCSurplus users to track and view all required changes identified for Sales Listings submitted by GCSurplus Sales Representative users for review. This functionality should include the ability to track and view required changes at the Sales Listing level (e.g. number of times a Sales Listing has been returned, theme of changes and detailed comments), as well as at the Sales Representative level (e.g. for all Sales Listings assigned to a Sales Representative within a period of time define-able by GCSurplus) to allow GCSurplus to review trends and performance to understand potential training needs and required business or template modifications.*	2		
FL-4	M at go-live	The solution must provide the functionality for authorized GCSurplus users to opt to either publish online a finalized and approved Sales Listing immediately upon approval OR to schedule its publication for a later date/time.	5		
FL-4.1	M at go-live	Prior to live publication of a Sales Listing on the GCSurplus.ca public website, functionality FL-4 must provide the functionality for authorized GCSurplus users to modify the scheduling or duration of the publication of the Sales Listing. When a Sales Listing is published Live to GCSurplus.ca and this functionality is actioned the solution must provide the functionality to automatically re-set the closing date/time for the associated Sales Listing according to the appropriate business day.	5		
FL-4.2	M at go-live	The solution must provide a countdown functionality viewable to all users on the Live Sales Listing which counts down the time remaining (days, hours, minutes, seconds) until the close of each Sales Listing in real time.	5		
FL-4.3	*Desirable*	*The solution should provide the functionality for authorized GCSurplus users to manually override payment times and pick-up ti mes identified in a Sales Listing when there has been a change in the closing date/time of the Sales Listing.The default payment period is three (3) days for payment, seven (7) days to pick-up. his requirement arises when the closing date of the Sales Listing is postponed or when publication of the Sales Listing is delayed from original schedule.*	2		
FL-5	*Desirable*	*The solution should provide the functionality for GCSurplus users to configure the duration of the time period for Sales Listings to be displayed under the "Sales Listings Ending soon" parameter.*	2		
Customer-1	M at go-live	The solution must provide the functionality for interested buyers and Customer users to view Sales Listings on the publicly accessible GCSurplus.ca website.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
Customer-1.1	M at go-live	The solution must provide the functionality for interested buyers and Customer users to view all or to search, sort and view a subset of Sales Listings sorted by a variety of parameters. This must include at a minimum: - Sales Listings Posted today; - Sales Listings Closing today; - Sales Listings Posted in the last 48 hours; - Sales Listings Posted this week; - Sales Listings Ending soon (configurable would be a nice to have); - Sales Listings by Commodity (ies); - Sales Listings by Region(s); - Sales Listings by City (this functionality must provide a selectable drop down menu pre-populated by data in system); - Sales Listings by dollar value or dollar range; - by keyword; - by boolean search (i.e. Free-form text entry); - by Live Sales Listings only; - by 'Sold' Sales Listings; - user's choice to include or not include cancelled Sales Listings in the search.	5		
Customer 1.1.1	M at go-live	The solution must provide the functionality for interested buyers and Customer users to view Summary results for each Sales Listing which must display the following fields and defining information from the detailed Sales Listing at a minimum: - Item description; - Minimum Bid amount ($); - Posted date and time of Sales Listing; - Closing date and time of Sales Listing; - Time remaining prior to Closing date and time of Sales Listing (this may be updated dynamically, or as of time of the Customer's search); - Location of Item (city and province only); and - Sales Account number.	5		
Customer-1.1.2	M at go-live	The solution must provide the functionality for summary results for each Sales Listing to display an image of the Item co-located with the minimum defining information.	5		
Customer-1.1.3	M at go-live	The solution must provide the functionality for interested buyers and Customer users to select and view the Detailed Sales Listing from the Summary Sales Listing.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
Customer-1.2	M at go-live	The solution must provide the functionality for interested buyers and Customer users to view the Detailed Sales Listing, which must display the following fields and defining information at a minimum: - Item description; - Closing date and time of sale; - Time remaining prior to Closing date and time of Sales Listing (this may be updated dynamically, or as of time of the Customer's search); - Quantity of Sales item; - Description of Sales item; - Image(s) of Sales item; - Location of Item (full address of Location); - Contact person for Item (including name, phone and e-mail address); - Sales Representative for Item (including name, phone and e-mail address); - Sale Account number; - Payment Clause; and - Clauses associated with the Item.	5		
Customer-1.2.1	M at go-live	The solution must provide the functionality for interested buyers and Customers to share the Sales Listing on a variety of social media, including at a minimum all of: Facebook, Twitter, Digg, Stumbleupon and Reddit.	5		
Customer-2.1	M at go-live	The solution must provide the functionality for interested buyers and Customers to search, sort and view historic Sales Listings including, at a minimum, the Item and the dollar amount of the awarded bid for each historic Sales Listing.	5		
Customer-2.2	M at go-live	Functionality Customer 2.1 must provide the functionality for interested buyers and Customers to view bid results for six (6) months of historic Sales Listings, at a minimum.	5		
Customer-3	*Desirable*	*Functionality Customer-1 should provide the functionality for interested buyers to search for, sort and view Sales Listings regardless of whether they are registered Customers in the solution.*	5		
Customer-4	M at go-live	The solution must provide the functionality for interested buyers and Customers to set and modify "favourites" based on any combination of the following variables, at a minimum: - Commodity(ies); - Region(s); - Item; and - Keyword, etc. (see also item N-23).	5		
Customer-4.1	M at go-live	Functionality Customer-4 must provide the functionality for Customer users to identify any combination of Commodity group(s) and Region(s), with no upper limit on the number of Commodity group(s) and Region(s) a Customer may set as favourites.	5		
Customer-4.2	*Desirable*	*Functionality Customer-4 should provide the functionality for interested buyers to set and view favourites regardless of whether they are registered Customers in the solution (see CMA-3 below).*	2		
Customer-5	M at go-live	The solution must provide the functionality for Customers to bid on Sales Listings online in real time with visibility into the previous bids received for the Sales Listing. This functionality must hash the Customer user ids associated with bids for security purposes.	5		
Customer-5.1	M at go-live	The solution must provide the functionality for Customer users to enter and view their bid for an Item directly from the Detailed Sales Listing for that Item.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
Customer-5.2	M at go-live	The solution must provide the functionality for Customer users to access the Terms and Conditions for the Sale when submitting a bid.	5		
Customer-5.3	M at go-live	The solution must provide the functionality to require the Customer user to confirm his/her Bid (following which the Bid is considered formally submitted to the auction - the solution must not allow the Customer user to delete or cancel a bid once a Bid Amount has been formally confirmed by the Customer in this function.	5		
Customer-5.3.1	M at go-live	The solution must display the following information to the Customer during Bid Confirmation, at a minimum: - Item description; - Customer's Bid Amount; and - the Terms and Conditions for the Sale.	5		
Customer-5.4	M at go-live	The solution must provide the functionality for Customer users to enter a new (higher) bid for the Item after they have submitted a bid. This functionality must be available for the Customer for the Item up to the Closing date and time of sale.	5		
Customer-5.5	M at go-live	The solution must provide the functionality for Customer users to submit their maximum bid for a Sales Listing and the solution must provide the functionality to auto increment the Customer users' bid for the Sales Listing based on other Customers' bids to the same Sales Listing.	5		
Customer-5.5.1	M at go-live	When a Customer user has entered a maximum bid amount, the solution must display the Customer user's maximum bid and the Customer user's current bid and require the Customer user to confirm the amounts prior to the solution accepting the bids.	5		
Customer-5.6	M at go-live	The solution must provide the functionality for Customer users to return to the Sales Listing without submitting a bid for the Item.	5		
FL-6	M at go-live	The solution must provide the functionality for authorized GCSurplus users to edit and update specific fields on any given live Sales Listings (with access rights) within a defined time frame after publication of the Sales Listing to GCSurplus.ca("go live"). The defined time frame must be configurable by GCSurplus administrator users.	5		
FL-7	M at go-live	Functionality FL-6 must provide the functionality for authorized GCSurplus users to modfiy the contact name and contact phone number associated with a Live Sales Listing at any time.	5		
FL-8	M at go-live	Functionality FL-6 must provide the functionality to force cancellation of a Sales Listing when any other fields are changed in a Live Sales Listing.	5		
FL-9	M at go-live	The solution must provide the functionality for GCSurplus to receive inquiries and feedback from Customer users on a specific Sales Listing through the solution.	5		
FL-9.1	M at go-live	The solution must provide the functionality for Customer users to submit inquiries and feedback to the assigned GCSurplus Sales Representative directly from a specific Sales Listing, automatically identifying the specific Sales Listing to which the question pertains.	5		
FL-9.2	M at go-live	The solution must provide the functionality for the assigned GCSurplus Sales Representative user to opt to publish the iniquiries and answers to Customer inquiries to the public GCSurplus.ca website associated with the Sales Listing to which they pertain.	5		
FL-9.3	M at go-live	The solution must provide the functionality for the assigned GCSurplus Sales Representative user to opt to reply directly to the Customer user who submitted the inquiry.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
FL-10	M at go-live	The solution must provide the functionality for authorized GCSurplus users to cancel a Live Sales Listing (at any time). This functionality must require the GCSurplus user to enter the reason for cancellation and update the status of the Sales Listing to "cancelled" within the solution.	5		
FL-10.1	M at go-live	The solution must provide the functionality for GCSurplus to modify a cancelled Sales Listing and re-list the Sales Listing on the GCSurplus.ca public website as a unique new Sales Listing. This functionality must be provided in a manner that retains all original data associated with the original Item(s), SR(s) and Sales Listing accessible to GCSurplus in the solution and associated to the new Sales Listing	5		
FL-10.2	M at go-live	The solution must provide the functionality for GCSurplus users to display Sales history at an Item level and at a Sales Listing level and report on Items and Sales Listings as "Sold", cancelled and "re-list" and cancelled and "not sold".	5		
		Listing Closed/Payment			
LC/P-1	M at go-live	The solution must provide the functionality for the assigned GCSurplus Sales Representative user to "action" the Sales Listing from the "Closed Sales Listing" notification (see N-29).	5		
LC/P-1.1	M at go-live	The solution must provide the functionality to display the Highest bid associated with a Closed Sales Listing on the online Sales Listing automatically. This functionality must display the dollar amount of the bid amount only.	5		
LC/P-1.2	M at go-live	If the assigned GCSurplus Sales Representative user is notified by a Customer user, the solution must provide the functionality for the assigned GCSurplus Sales Representative user (with access rights) to cancel a bid placed by a Customer.	5		
LC/P-1.3	M at go-live	When functionality LC/P-1.2 is actioned, the solution must provide the functionality to un-award the Sale to the highest bidder and must provide the assigned GCSurplus Sales Representative user with functionality to action the following options: - Second Chance Listing (see LC/P-1.4 below); - Re-list Item(s) (see ISL-13 above). This functionality must update the original Sales Listing record with the status "did not sell". - Cancel (see FL-10 above). This functionality must provide the functionality for the assigned GCSurplus Sales Representative user to select for each Item associated with the Sales Listing whether to return the Item to the GCSurplus Inventory or to Scrap the Item(s) and update the GCSurplus Inventory. This functionality must require the authorized GCSurplus Sales Representative user to record the reason for the cancellation in the solution. This functionality must update the GCSurplus Inventory (either "return to Inventory" or "scrap"). This functionality must update the original Sales Listing record with the status "did not sell" and the reason (e.g. cancelled).	5		
LC/P-1.4	M at go-live	**Second chance offering** Upon closing, the solution must provide the functionality for authorized GCSurplus users to cancel the highest bid by the successful Customer user, and to notify the second highest bidding Customer user (based on the next highest maxmium bid amount) that they may accept a "Second Chance Offering" to purchase the Item(s) for the second highest bidding Customer's last bid amount. This functionality must provide the functionality for the Customer user to respond to the notification within a defined time period (configurable by GCSurplus). The solution must provide this functionality one (1) time only (i.e. to the next highest bidding Customer only) following cancellation of the original highest bid.	5		
LC/P-1.4.1	M at go-live	When a Second Chance offering is actioned by the authorized GCSurplus user and accepted by the second highest bidding Customer user, the solution must automatically update the displayed Highest Bid associated wtih the Sales Listing (see LC/P-1.1).			

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
LC/P-2	M at go-live	The solution must provide the functionality for the assigned GCSurplus Sales Representative user to validate the successful Customer (e.g. Customer meets conditions of sale, Customer is in compliance with system terms of use, etc.).	5		
LC/P-2.1	M at go-live	The solution must provide the functionality for the assigned GCSurplus Sales Representative user to reject the successful Customer user's bid and record the reason for rejection. This functionality must send a message to the Customer user for the Item record including the following information at a minimum: - Sale Account number; - Item description; - Date of Rejection; - Reason for rejection.	5		
LC/P-2.2	M at go-live	The solution must require the assigned GCSurplus Sales Representative user to formally action the Award of a Sale within the solution. The solution must not allow any Sales Listings to be automatically awarded.	5		
LC/P-3	M at go-live	The solution must provide the functionality for the assigned GCSurplus Sales Representative user to generate an Acceptance of Offer and Request for Payment for the awarded Customer user and make these files available to the Customer user within their user account in the solution.	5		
LC/P-4	M at go-live	The solution must provide the functionality for the Customer user to save and print files from GCSurplus directly from their browser.	5		
LC/P-5	M at go-live	The solution must provide the functionality for Customer users to opt to **apply payment online** when this functionality has been enabled by GCSurplus for the Sales Listing. This functionality must be configurable by GCSurplus to enable and disable the option for Customers to pay online.	5		
LC/P-5.1	M at go-live	The Apply Online Payment function must provide the functionality to display to the Customer user the following information associated with the Awarded Item, at a minimum: - Customer's name, full address and phone number; - Sale Account number; - Invoice number (This must allow the Customer to view, save and print the full invoice); - Sales Representative (including name, phone number and e-mail address); - Item number; - Item description; - Customer Bid Amount Awarded; - Applicable Sales Tax on Bid Amount Awarded (shown separately); - Sub-total (Customer Bid Amount Awarded plus Applicable Sales Tax); - Amount Paid (to date); - Balance Owing.	5		
LC/P-5.2	M at go-live	The Apply Online Payment function must provide the functionality for the Customer user to apply payment to the Awarded Item by Credit Card (Visa, Mastercard and American Express only), allowing the Customer to enter the following information at a minimum: - Credit Card Holder name; - Credit Card Number; - Credit Card Expiry Date; - Credit Card Security Code.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
LC/P-5.3	M at go-live	Upon submitting payment, the Apply Online Payment function must provide the functionality to send an API request to Canada's Payment Process (currently Chase Paymentech) and validate whether or not a Payment is successfully applied. Following submission by the Customer, the Allow Payment function must notify the Customer by either acknowledging successful payment, displaying a payment authorization number and updating the balance owing and Status of the Awarded Item in the solution, or returning an error message to the Customer that payment was unsuccessful (as appropriate).	5		
LC/P-5.4	M at go-live	The solution must provide the functionality to maintain a record of all attempted credit card payments by the Customer user.	5		
LC/P-5.5	M at go-live	For traceability, the Apply Online Payment function must provide the functionality to force payment by Awarded Item rather than by group of Awarded Item(s).	5		
LC/P-5.6	M at go-live	The Apply Online Payment function must provide the functionality for the Customer to return to the Awarded Item Summary with our without applying payment.	5		
LC/P-5.7	M at go-live	The solution must provide the functionality to update the Awarded Item Summary in real time, reflecting actually payment(s) applied by the Customer.	5		
LC/P-5.8	M at go-live	When payment is made online by credit card, the solution must provide the functionality to ensure that the credit card used for payment is a valid card associated with the address of the awarded Customer user.	5		
LC/P-5.9	M at go-live	The solution must provide online payment functionality in compliance with Payment Card Industry (PCI) standards.	5		
LC/P-6	M at go-live	The solution must provide the functionality to validate and record payment by Customer users for Sales Listings. This must include the functionality to record payment made online and payment made in person at a GCSurplus Sales Centre (including at a minimum: identification of which GCSurplus Sales Centre and GCSurplus personnel received the payment).	5		
LC/P-7	M at go-live	When payment has been received from the awarded Customer user, the solution must provide the functionality for the assigned GCSurplus Sales Representative user to regenerate the Invoice in the solution with an updated status of paid in full.	5		
LC/P-8	M at go-live	The solution must provide the functionality for the Customer to select “online shipping” (where the "online shipping" option has been previously enabled by GCSurplus for the Sales Listing. The solution must not allow the Customer user to modify the shipping address from their previously registered and validated Customer user address.	5		
LC/P-8.1	M at go-live	Functionality LC/P-8 must provide the functionality to apply and manage tax rates for shipping at the Item level, as appropriate to the Customer user's registered address.	5		
LC/P-8.2	*Desirable*	*The solution should provide the functionality for GCSurplus users to record Shipping fees due on a Customer user's account and Invoice, associated with each Item being shipped.*	2		
LC/P-8.3	M at go-live	The solution must provide the functionality for the awarded Customer user to add an alternate person who is named in the Authorization to Release to allow another party to pick-up purchased Item(s) on behalf of the Customer.	5		
LC/P-8.4	M at go-live	Upon validation of payment in full, where the online shipping functionality is disabled for the Sales Listing OR where the awarded Customer user does not choose the online shipping option, the solution must provide the functionality for the assigned GCSurplus Sales Representative user to generate the Authorization to Release and the Pick-up Location and make these files available to the Customer user within their user account in the solution.	5		
LC/P-8.5	M at go-live	Upon generation of the Authorization to Release for the Customer, the solution must provide the functionality to simultaneously generate the Authorization to Release for the GCSurplus Sales Centre or Client (as applicable for the Sales Listing) and make these files available to the appropriate user within the solution.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
LC/P-8.5.1	*Desirable*	Functionality LC/P-8.5 should provide the functionality for the assigned GCSurplus Sales Representative user to add additional Client contact(s) to the file who will receive the Authorization to Release and associated documentation.	2		
LC/P-8.6	M at go-live	When the Item(s) will be picked up at the GCSurplus Sales Centre or Client location (as applicable to the Sales Listing), the Authorization to Release must include Pick-up Instructions identifying at a minimum the name of the authorized Customer user or identified alternate (see LC/P-8.1) and the date by which pick-up is required to be completed.	5		
LC/P-8.7	M at go-live	When online shipping has been selected by the Customer user, the Authorization to Release must include Shipping Instructions, including at a minimum the shipping address of the awarded Customer user. Online shipping will only occur for Item(s) located at GCSurplus Sales Centres.	5		
LC/P-9	M at go-live	The solution must provide the functionality for GCSurplus to verify and track confirmation of Customer user identity, receipt of payment, Customer compliance with terms of sale and confirmation that the correct Item(s) are released to the correct person.	5		
LC/P-10	M at go-live	The solution must provide the functionality for GCSurplus users and Client users to record when (date/time) Items have been picked-up by the Customer user or authorized alternate.	5		
LC/P-10.1	M at go-live	The solution must provide the functionality for GCSurplus users to record when (date/time) Items have been shipped to the Customer user, together with tracking and notification of receipt by the Customer.	5		
LC/P-10.2	*Desirable*	*Functionalities LC/P-10. and LC/P-10.1 should provide the functionality to electronically reconcile GCSurplus Inventory against Sale, Shipment and Customer pick-up activities at the Item level.*	2		
LC/P-11	*Desirable*	*The solution should provide the functionality to notify the Customer user, GCSurplus Sales Centre and the Client user when an item has been paid for but has not yet been picked up for action.*	2		
LC/P-11.1	*Desirable*	*Functionality LC/P-11 should provide the functionality for Client users to receive a "bring forward" identifying Item(s) located at the Client's location that have been paid for but not yet picked-up.*	2		
LC/P-11.2	*Desirable*	*Functionality LC/P-11 should provide the functionality for the assigned GCSurplus Sales Representative user to receive a "bring forward" identifying Item(s) located at the GCSurplus Sales Centre and Item(s) located at Client locations that have been paid for but not yet picked-up.* *This functionality should provide the functionality for the assigned GCSurplus Sales Representative user to push a notification to the awarded Customer user that the item is overdue for pick up. This functionality should provide the functionality for multiple notifications to be pushed to the Client including: "first reminder", "second reminder", and "last call - 48 hours to forfeiture of Item(s)".* *This functionality should provide the functionality for the assigned GCSurplus Sales Representative user to manually override "pick-up due date" notification when the Customer user has notified GCSurplus that an additional day is needed prior to pick-up.*	2		
LC/P-12	M at go-live	The solution must provide the functionality for GCSurplus users to manage forfeiture of Item(s) by Customers who have not picked-up their purchased Item(s) after multiple notifications. This functionality must provide the functionality for the authorized GCSurplus user to opt to re-list the Item(s), to return the Item(s) to the GCSurplus Inventory, or Scrap the Item(s). This functionality must be tied to and update the GCSurplus Inventory).	5		
LC/P-13	M at go-live	Where an Item has been forfeited by a Customer and the Item is re-listed and sold, the solution must provide the functionality for GCSurplus to allocate the proceeds of the new Sale.	5		
		Payment			

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
P-1	M at go-live	The solution must provide the functionality to record and retain data on sold, paid for and picked-up Items (and refunds as applicable), matched to funds received from Customers to allow for the appropriate transfer of funds to the originating Client by GCSurplus. Data must be structured by Consignee.	5		
P-2	*Desirable*	*The solution should provide the functionality for GCSurplus users to add and remove flags ("administrative holds") to be placed on funds received from Customers before they are distributed to Clients (at the Item level).*	2		
P-3	*Desirable*	*The solution should provide the functionality to alert GCSurplus users prior to recording an authorized transfer of funds to a Client to identify whether the file is complete (e.g. prompt whether all required chargebacks are included) and to add and edit notes to the file to identify whether additional charges may be forthcoming.*	2		
P-4	M at go-live	The solution must provide the functionality for GCSurplus users to apply, manage and track revenue and commissions received on a per Item basis for accounting, disbursement and reporting.	5		
P-5	M at go-live	The solution must provide the functionality for GCSurplus user to display to the Client within the Client's user account, the Client's revenue from each Sale (at the Item level).	5		
P-6	M at go-live	The solution must provide the functionality to apply and manage tax rates from all Canadian provinces and territories at the Item level.	5		
P-7	*Desirable*	*The solution should provide the functionality for GCSurplus users to record and manage Land Identification Numbers associated with tax exempt status including the ability to record whether a number is valid. This functionality should alert GCSurplus users when a number is invalid for subsequent action.*	2		
P-8	*Desirable*	*The solution should provide the functionality for GCSurplus to identify and manage tax exempt status for Customers (at the Item level on invoices and at the Customer profile level).*	2		
P-9	M at go-live	The solution must provide the functionality for GCSurplus to accept bids and payment in Canadian Dollars (CAD) only.	5		
		Refund			
R-1	M at go-live	The solution must provide the functionality for GCSurplus users to record a request for refund made by a Customer user for a paid Item. This record must be at the level of the Customer user profile and at the Item level (e.g. A Sales Listing may have contained multiple Items and a refund is not requested on all Items are to be refunded).	5		
R-1.1	M at go-live	The solution must provide the functionality for the GCSurplus user to identify whether the refund is requested for the full amount of the Sale, or in part, and to enter comments on the request for refund.	5		
R-1.2	M at go-live	Functionality R-1 must provide the functionality for GCSurplus users to automatically forward the request for refund record to another authorized GCSurplus user (e.g. Manager) for action and/or approval.	5		
R-1.3	M at go-live	Functionality R-1 must provide the functionality for authorized GCSurplus users to select and perform the following actions: - Refund (This must provide the functionality for the authorized GCSurplus user to identify whether Items are to be returned by the Customer); and - Refund with Listing Cancelled (This must provide the functionality for the authorized GCSurplus user to opt to re-list the Item(s), to return the Item(s) to the GCSurplus Inventory, or Scrap the Item(s). This functionality must be tied to and update the GCSurplus Inventory).	5		
R-2	M at go-live	The solution must provide the functionality for refunds to be issued to the Customer user based on their original method of payment.	5		
R-2.1	*Desirable*	*The solution should provide the functionality for GCSurplus users to opt to charge fees to a Customer account when the Customer requests a refund. This functionality should provide the functionality to deduct the fee charged from the original amount of the Sale paid by the Customer user. This functionality should track refund amount(s) retained by GCSurplus at the Item level.*	2		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
R-3	M at go-live	The solution must provide the functionality for GCSurplus users to record and track refund amount(s) by consignee and by Client, including the functionality to allocate a portion of the amount(s) refunded between GCSurplus and the Client/consignee associated with the Item(s) refunded.	5		
R-5	M at go-live	The solution must provide the functionality for GCSurplus users to track and display individual refund request details and refund trends, including which Customer users are requesting refunds, Item(s) on which refunds are requested, the quantity (#) of refunds requested and approved, the dollar value of refunds requested and approved, and the identity of the GCSurplus user(s) approving the refunds.	5		
		Reconciliation			
Rec-1	M at go-live	The solution must provide a "**Finance View**" functionality providing the functionality for GCSurplus Finance users to display all Sales and Refunds including clear identification of all revenue, commission, credits and debits; including at a minimum the following views (in summary and with the functionality to view at a detailed level): - by Item; - by transaction (SR); - by Consignee; and - by Region.	5		
Rec-1.2	M at go-live	The solution must provide the functionality for GCSurplus Finance users to view all revenues and expenses associated with each Item at the Item level (i.e. For SRs and Sales Listings including multiple items, the solution must provide the functionality for GCSurplus Finance users to accurately track and report on the allocation of revenues and expenses per Item).	5		
Rec-2	M at go-live	The solution must provide the functionality for automatic reconciliation of funds received from Customer users to the associated Sale record and Refund record (where applicable). This functionality must be accomplished via a data push/pull from PWGSC's Financial System SIGMA. This functionality must provide the functionality for automatic reconciliation by Consignee, by Client and by Region, at a minimum.	5		
Rec-3	*Desirable*	*The solution should provide the functionality to automatically generate exception reports or notifications/alerts when financial data does not align between GCSurplus.ca and the data transfer from SIGMA.*	2		
Rec-4	*Desirable*	*The solution should provide the functionality for GCSurplus Finance users to receive electronic alerts at a transaction level when financial actions are pending or required (e.g. refund pending, etc.)*	2		
Rec-5	M at go-live	The solution must provide the functionality for GCSurplus Finance users to record, assign, charge and cancel “charge backs” and expenses at the Consignee level (e.g. for towing, postage, translation, services, appraisals, etc.).	5		
Rec-6	M at go-live	The solution must provide the functionality for GCSurplus Finance users to modify variables set on financial data (e.g. Commission rate applied) to correct recording errors. When actioned by the GCSurplus Finance user, this functionality must re-reconcile all financial data.	5		
		Period Contracts			
Period Contracts consist of the declaration, listing and Sale by auction of the right for a Customer to purchase an identified estimated quantity of defined metals/materials. Customers must bid on all metals/materials to be included in the Period Contract but may bid a distinct dollar amount for each type of metal/material identified. The successful Customer receives a contract prepared by GCSurplus with a start date and end date and associated terms and conditions. At several defined points over the period of the contract, the Customer pays for and picks up a quantity of the identified metals/materials, processes the metals/materials and provides a weighscale ticket to GCSurplus as evidence of the quantity and type of metals/materials successfully processed. Payment is then reconciled.					

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
PC-1	M at go-live	The solution must provide the functionality for Client users to create SRs for Period Contracts. This functionality must provide all of the functionality for "non-vehicle asset" SRs (as identified in section-PSR), in addition to the following functionality for the Client user: - For each Item declared, identify the Type(s) of metals/materials [each Type must be individually defined by the Client user]; - For each Item declared, for each Type of metal/material identified, identify the estimated Quantity of metals/materials [the Quantity for each Item must be individually defined by the Client user. This must include the functionality to identify specific quantities and the functionality to identify estimated percentages of each Type of metal/material contained within an Item].	5		
PC-2	M at go-live	The solution must provide the functionality for GCSurplus Sales Representative users to create and manage Period Contracts Sales Listings. This functionality must provide all of the functionality for the creation and management of Sales Listings (see sections ASR and ISL), in addition to the following functionality for the assigned GCSurplus Sales Representative user to: - Confirm the estimated type(s) of metals/materials and quantit(ies) of each type of metals/materials identified in the SR; - Record, at a minimum, the Contract start date; Contract end date; Sales Listing start date; Sales Listing end date.	5		
PC-3	M at go-live	The solution must provide the functionality for Customer users to view, search, display and submit bid(s) on Period Contract Sales Listings. This functionality must provide the functionality for Customers to identify and confirm unique bid amounts for each Item in the Period Contract Sales Listing. The solution must require the potential Customer to bid on all Item(s) associated with the Period Contract Sales Listing.	5		
PC-4	M at go-live	The solution must provide the functionality to identify the successful Customer as the Customer user who bid the highest total bid amount combined for all Item(s) associated with the Period Contract Sales Listing.	5		
PC-5	M at go-live	The solution must provide the functionality for GCSurplus users to record receipt of a Performance Deposit from the successful Customer user awarded the Period Contract. The performance deposit is a percentage (%) of the bid amount that is identified by GCSurplus.	5		
PC-6	M at go-live	The solution must provide the functionality for GCSurplus users to remove a Performance Deposit from a Customer user's account when that Customer has successfully completed the Period Contract.	5		
PC-7	M at go-live	The solution must provide the functionality for GCSurplus users to record the assignment of a Performance Deposit received from a Customer user from one Period Contract to another Period Contract for which the same Customer user is the Awarded Customer. This functionality must alert the GCSurplus user when the dollar amount of the Performance Deposit varies from the value required for the second Period Contract for appropriate action.	5		
PC-8	M at go-live	The solution must provide the functionality for Client users to record multiple pick-up(s) of metals/materials by the Awarded Customer, including the estimated quantities of metals/materials included in each pick-up.	5		
PC-9	M at go-live	The solution must provide the functionality for GCSurplus users to attach scanned files of weigh scale tickets to the Period Contract record.	5		
PC-10	M at go-live	The solution must provide the functionality for GCSurplus users to record and track weigh scale tickets received from Customer users, including at a minimum: the weigh scale ticket number, date, Item(s), number of Item(s), and the quantities of metals/materials processed according to the weigh scale ticket and to reconcile these quantities against the estimated quantities of metals/materials in the Period Contract and display any variance.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
PC-11	M at go-live	The solution must provide the functionality to generate invoices according to the weigh scale ticket number and quantities of metals/materials recorded as processed and verified by the Client. This functionality must include the option for GCSurplus users to combine multiple weigh scale tickets received for the same Period Contract into a single invoice.	5		
PC-12	M at go-live	The solution must provide the functionality to automatically notify the Customer user when an Invoice is available in the solution and payment by the Customer user is required.	5		
PC-13	M at go-live	The solution must provide the functionality for Customer users to pay online for each invoice generated by GCSurplus. Note that Canada's payment processor currently requires a unique reference number in order to process a payment.	5		
PC-13	*Desirable*	*The solution should provide the functionality to present an option to Customers (configurable by GCSurplus) to establish multiple unique users (e.g. Logins and passwords) for a Customer account for Period Contracts.*	2		
PC-14	M at go-live	The solution must provide the functionality for authorized GCSurplus users to record and track multiple payments made by the Customer user at defined time periods against the same Period Contract.	5		
PC-15	M at go-live	When payment is verified as received by GCSurplus, the solution must provide the functionality to generate an Authorization to Release to the Client user and the Customer for the next scheduled pick-up.	5		
PC-16	M at go-live	The solution must provide the functionality to track when the end date of a Period Contract is approaching and provide an automatic notification to the assigned GCSurplus user when an end date is approaching. This functionality must provide the functionality for the assigned GCSurplus user to action a request to the associated Client user to authorize an end date extension to the Period Contract.	5		
PC-17	M at go-live	The solution must provide the functionality for workflow within the solution to forward requests for approvals for end date extension from assigned GCSurplus users to the associated Client user and forward the associated approvals from the Client user to the assigned GCSurplus user; prior to their proceeding to action an end date extension to the Period Contract.	5		
PC-18	M at go-live	The solution must provide the functionality for the assigned GCSurplus user to modify (e.g. extend) the end date of a Period Contract.	5		
PC-19	M at go-live	The solution must provide the functionality to notify both the Customer user to whom the Period Contract is assigned and the Client user when the Contract end date has been modified and to what date. This notificaton functionality may be provided by an e-mail or by a status update in the solution.	5		
PC-20	M at go-live	The solution must provide the functionality for GCSurplus users to track activity on Period Contracts for audit purposes. This must include, at a minimum, changes to contract end dates; changes to contract dollar values; variances between estimated quantity of metals/materials by Item and reported quantity of metals/materials; together with the time and date stamp and user ID of the actioning and approving solution users.	5		
PC-21	*Desirable*	*The solution should provide the functionality for authorized GCSurplus users to track the identity of Customers associated with Period Contracts and Period Contract Sales Listings.*	2		
		Notifications and Alerts			
N-1	**M at time of Proposal**	The solution must provide a Notification module functionality within the solution for GCSurplus Admin Users to set-up and manage (i.e. Create, modify, assign to users, assign to user groups, enable, disable, remove) notifications and alerts for users and user groups.			
N-2	**M at time of Proposal**	The solution must provide all notification and alert functionality in a manner that is configurable by GCSurplus Admin Users to enable and disable each notification and alert for each individual user and for each user group (e.g. enable and disable a notification for all GCSurplus users in a Region).			

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
N-3	**M at time of Proposal**	The solution must provide the functionality for Client users and GCSurplus users to: a) receive electronic notifications by e-mail; and b) receive and view electronic notifications within their respective solution interface.			
N-4	**M at time of Proposal**	The solution must provide the functionality for Client users and GCSurplus users to receive and view electronic alerts within their respective solution interface.			
N-5	**M at time of Proposal**	The solution must provide Role-based Access Control (RBAC) that is configurable by GCSurplus Admin Users for all notification and alert functionality.			
N-6	M at go-live	The solution must provide the functionality to notify the GCSurplus Sales Officer in the applicable (default) Region when a Client user has registered for account access within that Region.	5		
N-6.1	M at go-live	The solution must provide the functionality to notify the Client user that their new Registration has been received.	5		
N-7	M at go-live	The solution must provide the functionality to automatically notify the GCSurplus Sales Officer user (via pop-up upon login and e-mail message) when a Client user in their Region has submitted a Sales Request (SR).	5		
N-8	M at go-live	The solution must provide the functionality for the Client user and the GCSurplus Sales Officer user to identify and manage (e.g. add, edit and delete) Government of Canada (GoC) contacts who will receive notifications related to each Sales Request and Sales Listing.	5		
N-9	M at go-live	The solution must provide the functionality for Clients and GCSurplus to identify one (1) or more contacts who will receive notifications related to a single Sales Request.	5		
N-10	M at go-live	The solution must provide the functionality to automatically notify the assigned GCSurplus Sales Representative user when an SR has been assigned to him/her.	5		
N-11	M at go-live	The solution must provide the functionality to automatically notify the Client user who submitted the SR of their assigned Sales Representative.	5		
N-12	M at go-live	The solution must provide the functionality for Client users to automatically notify GCSurplus of an Amendment request (i.e. a request to make a change or add information to a previously submitted SR).	5		
N-13	M at go-live	The solution must provide the functionality to automatically notify the assigned Sales Representative that new information is available in the SR when the Client user has submitted an Amendment.	5		
N-14	M at go-live	The solution must provide the functionality to automatically notify and alert GCSurplus and Client users when a new message has been received in their message centre.	5		
N-15	M at go-live	The solution must provide the functionality to automatically notify the GCSurplus Sales Representative user when he/she has action(s) pending on their assigned SR(s).	5		
N-16	M at go-live	The solution must provide the functionality to automatically notify Client users when there are updates in the status of their SR(s) and when action(s) are required by the Client on their SR(s).	5		
N-17	M at go-live	The solution must provide the functionality for GCSurplus users to notify the Client of any variances between the submitted SR, the packing slip/waybill/manifest and what is physically received at the GCSurplus Regional Sales Centre. This functionality must provide, at a minimum, the functionality to identify variance(s) in quantity, condition, and the presence of any additional items.	5		
N-18	*Desirable*	*The solution should provide the functionality to provide automatic notification to GCSurplus users when additional information or action(s) related to a received item are required by GCSurplus, based on business rules related to the type of item (e.g. high risk items requiring insurance, shipping requirements, special terms and conditions, etc.).*	2		
N-19	*Desirable*	*The solution should provide the functionality to electronically notify and alert GCSurplus users of required action(s) and pending "bring forwards" associated with their Sales Listing(s).*	2		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
N-20	M at go-live	The solution must provide the functionality for GCSurplus users to notify or send messages to other GCSurplus users when a Sales Listing is pending for review, as well as to provide follow-up notices or messages to the originating user when an action is taken, or if the Sales Listing is returned to the originating user for action.	5		
N-21	*Desirable*	*The solution should provide the functionality to automatically notify previously defined contacts that a Sales Listing has been updated (see N-8).*	2		
N-22	*Desirable*	*The solution should provide the functionality to automatically notify the Client representative associated with a Sales Listing when the Sales Listing/Sales Notice has been published and is "live" (viewable by the public) on GCSurplus.ca.*	2		
N23	M at go-live	The solution must provide the functionality for interested buyers and Customers to receive electronic notification of Sales Listings/ and Sales Notices that go live which align to their previously set favourites.	5		
N-23.1	*Desirable*	*The solution should provide the functionality for GCSurplus users to send notifications to Customers about Sales Listings based on the Customers' bidding history and favourites (e.g. commodity group(s), region(s), etc.), including a link to the specific Sales Listing/Sales Notice in the notification.*	2		
N-23.2	*Desirable*	*If functionality N-23.1 is provided the solution must provide the functionality for Customers to easily "unsubscribe" or "opt out" of receiving these notifications.*	2		
N-24	M at go-live	The solution must notify Customer users when they are the current high bidder on a Sales Listing.	5		
N-25	M at go-live	The solution must notify Customer users when they have been outbid.	5		
N-26	M at go-live	The solution must provide the functionality to automatically notify Customer users who have submitted a bid to a Sales Listing when there has been a change to that Sales Listing. This notification functionality must be set as 'opt in' by default for Customer users.	5		
N-27	M at go-live	The solution must provide the functionality to electronically notify Customers: - when the status of a Sales Listing in their Watch List changes; - when a certain time period is remaining before the closing date and time of a Sales Listing in their Watch List. The time period must be configurable by the Customer.	5		
N-28	M at go-live	The solution must provide the functionality to automatically notify Customer users who have submitted a bid to a Sales Listing and Customer users who have added a Sales Listing to their "watch list" when that Sales Listing has been cancelled. At a minimum, the following information must be displayed: - Item description; - Bid Amount (by Customer user); - Minimum Bid Amount; - Reason for cancellation of Sales Listing.	5		
N-28.2	M at go-live	The solution must provide the functionality to automatically notify Customer users who had previously submitted a bid to a subsequently cancelled Sales Listing and Customer users who had added that subsequently cancelled Sales Listing to their "watch list" when the cancelled Sales Listing has been re-listed by GCSurplus.	5		
N-28.3	*Desirable*	*The solution should provide the functionality for GCSurplus administrator users to create and send automatic alerts to GCSurplus users to trigger action(s). For example, send an alert to the assigned GCSurplus Sales Representative user when the number of bids for a Live Sales Listing < # (where # is configured by GCSurplus); and other events based on configurable business rules. All alerts created in the solution by GCSurplus should provide the functionality for users to 'opt in' and 'opt out' of receiving the alerts.*	2		
N-29	M at go-live	The solution must provide the functionality to automatically notify the assigned GCSurplus Sales Representative user when a Sales Listing has closed. This must include identification of the successful Customer user (i.e. the highest bidder).	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
N-30	M at go-live	The solution must provide the functionality to automatically notify the Customer user who is the Highest Bidder when a Sales Listing has closed that they are the highest bidder and that the Sales Representative will be in contact.	5		
N-30.1	M at go-live	Functionality N-30 must provide the functionality to automatically alert the Customer user who is the Highest Bidder "you've won" if the Customer user is logged into the solution at the time of Sales Listing closing.	5		
N-31	M at go-live	The solution must provide the functionality for GCSurplus users to electronically notify the appropriate Client user when an item listed for sale did not sell and the Sales Listing has closed.	5		
N-32	M at go-live	The solution must provide the functionality for GCSurplus users to electronically notify the successful Customer user that their bid has been accepted.	5		
N-33	M at go-live	The solution must provide the functionality for GCSurplus users to electronically notify unsuccessful Customer users who have submitted a bid to a Sales Listing when that Sales Listing has been awarded.	5		
N-34	M at go-live	The solution must provide the functionality for GCSurplus users to electronically notify the awarded Customer user that the Invoice and Authorization to Release are available for the Customer user to access.	5		
N-35	M at go-live	The solution must provide the functionality to automatically notify the Sales Centre and Client associated with a Sales Listing when an Item located at the Client's location has sold and successful payment has been received by GCSurplus from the successful Customer.	5		
N-36	M at go-live	The solution must provide the functionality to automatically notify the Sales Centre and Client associated with a Sales Listing when an Item located at the Client's location when the awarded Customer user has identified an alternate authorized to pick-up the Item on the Customer user's behalf see LC/P-8.2).	5		
N-37	*Desirable*	The solution should provide the functionality for GCSurplus Sales Representative users and Client users to electronically notify the Customer when an item has been paid for but has not yet been picked up for action.	2		
N-38	M at go-live	The solution must provide the functionality to automatically notify GCSurplus users and Client users of updates or changes to the features and functionality of the solution.	5		
		Solution Administration			
A-1	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to set, modify and re-set configurable parameters on actions and transactions associated with the solution's business functionality available to Client users, GCSurplus users, and Customer users. This must include, at a minimum, the following configurable variables: - Set and manage commission rates available for selection by GCSurplus Sales Representative users for use in Sales Listings and applied by GCSurplus Finance users in Client and Consignee account reconciliation; This functionality must provide the functionality to manage different commission rates by Commodity code, by Client, and by Item. - Set bid increments available for selection by GCSurplus Sales Representative users for use in Sales Listings; - Configure which functionalities users and user groups in each GCSurplus Region would receive access to.	5		
A-2	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to view, save, print, and transmit a full audit history (including date, time stamp and user id) for <u>all</u> actions completed within the system. This functionality must provide audit history by user, including the ability to drill down by transaction. This functionality must also provide a full audit trail of all administrative changes (e.g. updates to terms and conditions, templates, etc.) made by users.	5		
A-3	M at go-live	The solution must provide the functionality for authorized GCSurplus Solution Administrator users to search audit history within the solution, including the functionality to search on hashed values.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
A-4	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users and Client users to re-generate, save, print and transmit files that display the original date the file was first created on the re-generated file.	5		
A-5	*Desirable*	*The solution should provide the functionality for GCSurplus Solution Administrator users to configure the "time out" period on any and all user accounts (both Client and GCSurplus) to allow users to return to work in progress without having to re-log in.*	2		
A-6	*Desirable*	*The solution should provide the functionality for GCSurplus Solution Administrator users to develop and administer e-mail messages and surveys to any of Clients, Customers and GCSurplus users within the system, including the functionality to target messages and surveys to identified groups of Clients, Customers and GCSurplus users based on variables which are defined and configurable by GCSurplus.*	2		
A-7	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to publish notices for users within the system (with the ability to select for which specific user or user group(s) the notice is displayed). For example, notices could include, system terms of use, inclusion of PROTECTED information in a file, etc.	5		
A-8	*Desirable*	*The solution should provide an internal messaging functionality for Client users and GCSurplus users to send, receive and manage messages between Client users and GCSurplus within the solution. This functionality if provided must include access configurable by GCSurplus Solution Administrator users to set and re-set limits on user groups.*	2		
A-8.1	*Desirable*	*If provided, Functionality A-8 must be compatible with .NET Mail Server.*	2		
A-9	M at go-live	The solution must provide the functionality for GCSurplus to retain and retrieve all records in the solution (view, save, print and transmit) for a minimum of seven (7) years from the date each record was created.	5		
A.10	M at go-live	The solution must provide the functionality to receive and integrate within the solution data a daily record update of Consignee codes from CIS via FTP or third party API.	5		
		User Account Administration			
UAA-1	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to create, modify and delete user groups; assign users to user groups; and assign, edit, and delete the access rights, functions and privileges of all users at the individual user and the user group level.	5		
UAA-1.1	M at go-live	The solution must provide a variety of user types, including, at a minimum, the following: - GCSurplus user; - Client user; - Customer user; and - GCSurplus Solution Administrator user.	5		
UAA-1.1.1	M at go-live	The solution must provide a variety of roles for GCSurplus users, including, at a minimum, the following: - Admin; - Auditor; - Finance; - Manager; - Sales Officer; - Sales Representative; - Term and Conditions Editor; and - "unspecified" GCSurplus User (with full access rights and privileges).	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
UAA-1.1.2	M at go-live	The solution must provide a variety of types and roles for Client users, including, at a minimum, the following: - Non-federal Client; and - Federal Client Each Client user type must include, at a minimum, the following roles: Officer, Manager and Director (see PSR-2.3)	5		
UAA-1.2	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to manage Federal Client users, including, at a minimum, the following: - Send an e-mail to the Federal Client user when the Account has been created (through self-Registration); - Send an e-mail to request the Federal Client user to activate their account in GCSurplus.ca; - Send an e-mail to request the Fedearl Client user's Manager identified in the Federal Client user's Profile to authorize creation of the account in GCSurplus.ca; - Re-set and send a new password to the Federal Client user (whether following request to Retrieve forgotten password, or on demand); - Prepare, edit, save, delete and electronically send a notification to the Customer's Customer Message Centre; - 'Enable' and 'disable' functionality for the Federal Client user's account.	5		
UAA-1.3	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to manage Customer users, including, at a minimum, the following: - Re-set and send a new password to the Customer user (whether following a Customer user request to Retrieve forgotten password, or on demand); - Send a self-cancellation e-mail to the Customer user (where a Customer user has opted to cancel his/her user account); - Prepare, edit, save, delete and electronically send a notification to the Customer's Customer Message Centre; - Temporarily enable functionality for a Customer to change his/her Customer Profile information while a Sale or Payment is pending; - Set, modify and save Bidding Status for the Customer user's ability to Bid Online, allowing GCSurplus to toggle between 'enable' and 'disable'; - Set, modify and save Online Payment Status for the Customer user's ability to Apply Payment Online, allowing GCSurplus to toggle between 'enable' and 'disable'; - Set, modify and save the Account Status for the Customer user, allowing GCSurplus to toggle between 'enable' and 'disable' any or all functionality in the Customer user's account; - Set, modify and save the Authorization Status for the Customer user, allowing GCSurplus to toggle between 'Not Authorized', 'Authorized by Credit Card' and 'Manually Authorized'.	5		
UAA-2	M at go-live	The solution must provide the functionality for any user to be assigned and re-assigned by GCSurplus Solution Administrator users to one (1), some or all of the user groups available in the solution (as defined by GCSurplus).	5		
UAA-2.1	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to modify (assign, edit, enable, disable and delete) the access rights, functions and privileges of individual users without modifying the access rights, functions and privileges of the user groups to which the individual user is assigned.	55		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
UAA-2.2	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to identify in real time the number of users by type and group that are logged into the solution.	5		
UAA-3	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to add, modify, enable, disable and delete user profiles (individual accounts) for any user of the solution.	5		
UAA-3.1	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to search, retrieve and display, modify and save changes to the profile of any solution user.	5		
UAA-3.2	M at go-live	At a minimum, the solution must provide the functionality for **GCSurplus user profiles** to capture and display information in the following fields in a user-friendly manner (e.g. by drop down menus, radio buttons, free form text entry, etc.): - GCSurplus User number; - GCSurplus User name; - GCSurplus User e-mail address; and - GCSurplus User Group (see item UAA-2.1 above).	5		
UAA-3.3	M at go-live	At a minimum, the solution must provide the functionality for **Client user profiles** to capture and display information in the following fields in a user-friendly manner (e.g. by drop down menus, radio buttons, free form text entry, etc.): - User type and role; - User ID; - Default Asset Region; - Language Preference (allows selection between: English and Canadian French) - (optional data entry); - E-Mail format (allows selection between: HTML/Enhanced and Text/Plain) - (optional data entry); - Identify Client user's ability to add enhanced images to SRs (allows for toggle on/off by GCSurplus) - (optional data entry); - First Name; - Last Name; - Phone number; - Extension (optional data entry); - Fax (optional data entry); - E-Mail Address (requiring validation by the user to ensure the correct e-mail address is provided); - Address; - City; - Province; and - Postal Code.	5		
UAA-3.3.1	M at go-live	In addition,to UAA-3.3 above, the solution must provide the functionality for Client user profiles to capture and display the following information for Non-Federal Client users: - Consignee (optional data entry).	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
UAA-3.3.2	M at go-live	In addition,to UAA-3.4 above, the solution must provide the functionality for Client user profiles to capture and display the following information for Federal Client users: - Federal Client User Status ('enabled' or 'disabled'); - Federal Client User Registration date and time; - Date and time of last login by Federal Client User; - Date and time of verification by GCSurplus; - Date and time of authorization by Client Manager; - IP address of last login by Federal Client User; - Browser type and version of last login by Federal Client User; - Operating System of machine used at last login; - Status of Javascript enabled ('yes' / 'no'); - Flash version.			
UAA-3.3.3	M at go-live	At a minimum, the solution must provide the functionality for **Customer user profiles** to capture and display information in the following fields in a user-friendly manner (e.g. by drop down menus, radio buttons, free form text entry, etc.): - Customer Name; - Customer Number; - Customer Language of Choice; - Customer Type (e.g. Web or Region); - Customer Bidding Status; - Customer Online Payment Status; - Customer Registration Date (including date of Registration confirmation by GCSurplus); - Customer Account Status ('enabled', 'disabled', 'deleted'); - Customer Authorization Status; - Date and time of last login by Customer and identification of whether the Customer is currently logged into GCSurplus.ca; - Internet Browser type, version, and IP address used by Customer for last login; - Customer address; - Customer Phone; - Customer e-mail address; - Customer Password; - Customer "My Favourites" (including at a minimum: Commodity Groups and Regions previously identified by the Customer); and - A summary of all Bids entered by the Customer including identification of whether the associated Sale is 'open', 'closed', or 'Awarded' to the Customer. The Summary of Bids entered by the Customer must include at a minimum the following: o Sales Listing number; o Item number; o Item description; o Closing date of Sale; o Bid date and time by Customer; o Customer Bid Amount.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
UAA-3.4	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to **Search user** accounts in the solution. The Search user function must provide the functionality for GCSurplus Solution Administrator users to search and display a Summary of all or a subset of users, based on, at a minimum, one (1) or more of the following: - Partial user name; - User type (GCSurplus, Client, Customer); and - One (1) or more user group(s) (selectable by GCSurplus Solution Administrator users in the interface). The Search user function must provide the functionality for GCSurplus Solution Administrator users to search in a user-friendly manner (e.g. by drop down menus, radio buttons, free form text entry, etc.) for solution users by any one or combination of user profile fields whether the entered field is partial or complete. The solution must return and display the Search user search results in a summary format identifying the number of search results returned which includes at a minimum, for each retrieved user profile, the following information: - user number; - user name; - user type; - user group; - user e-mail address. The Summary of Search user search results returned must provide the functionality for GCSurplus Solution Administrator users to access and action the full profile (or a defined sub-set) for each user directly from the Summary.	5		
UAA-3.4.1	M at go-live	In addition to UAA-3.4 above, the Search user function must provide the functionality for GCSurplus Solution Administrator users to search in a user-friendly manner (e.g. by drop down menus, radio buttons, free form text entry, etc.) for Client User Profiles using any one (1) or more of the following fields at a minimum: - Keyword; - Address; - First Name; - Last Name; - E-Mail address; - Department/Consignee; - Manager First Name/Last Name/e-mail Address.			

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
UAA-3.4.2	M at go-live	In addition to UAA-3.4 above, the Search user function must provide the functionality for GCSurplus Solution Administrator users to toggle and search all or a subset of Client user profiles, including at a minimum: - By all Clients; - By 'disabled' Clients; - By Client Role (based on all Client Roles available in the system).	5		
UAA-3.4.3	M at go-live	In addition to UAA-3.4 above, the Search user function must provide the functionality for GCSurplus Solution Administrator users to return and display Client user profiles search results in a summary format identifying, for each identified Client Profile, the following information: - Client Alias; - Client Name; - Client e-mail address; - Client Department.	5		
UAA-3.4.4	M at go-live	In addition to UAA-3.4 above, the Search user function must provide the functionality for GCSurplus Solution Administrator users to search, return and display activity, actions and records associated with a Client user profile selected by GCSurplus. This functionality must provide the functionality for GCSurplus Solution Administrator users to search by keyword, at a minimum, and return a Summary results display of all actions undertaken by the selected Client user in the solution. At a minimum the Summary results display must include for each Client user activity, action or record, the date and time of the Client user's action, a narrative description, the Time (Total/SQL) of the action, and the parameters of the action.	5		
UAA-3.5.1	M at go-live	In addition to UAA-3.4 above, the Search user function must provide the functionality for GCSurplus Solution Administrator users to toggle and search all or a subset of Customer user profiles, including at a minimum: - all Customers; - 'enabled' Customers; - 'logged in' Customers; - 'disabled' Customers; and - 'deleted' Customers.	5		
UAA-3.5.2	M at go-live	In addition to UAA-3.4 above, the Search user function must provide the functionality for GCSurplus Solution Administrator users to search for Customers registered in the last #-days (with the functionality for GCSurplus Solution Administrator users to input the number of days dynamically in the Search).	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
UAA-3.5.3	M at go-live	In addition to UAA-3.4 above, the Search user function must provide the functionality for GCSurplus Solution Administrator users to return and display the Customer Profiles Search Results in a summary format identifying the number of Customer Profiles Search Results returned which includes at a minimum, for each identified Customer Profile, the following information: - Customer Type; - Customer Number; - Customer date of Registration; - Customer Name; - Customer Address; - Customer Phone; - Customer Password; - Customer e-mail address; - Customer IP (used on last login by Customer); - Status of Customer (‘enabled’, ‘deleted’ or ‘disabled’).	5		
UAA-3.5.4	M at go-live	In addition to UAA-3.4 above, the Search user function must provide the functionality for GCSurplus Solution Administrator users to set access rights for other GCSurplus Users to: - search for Customer Profiles by all or only a subset (configurable by GCSurplus Solution Administrator users) of the Customer Profile fields available in the solution; and - view all or only a subset (configurable by GCSurplus Solution Administrator users) of Customer Profile fields (as identified in Item UAA-3.4.3) for retrieved records.	5		
UAA-3.5.5	M at go-live	The Search user function must provide the functionality for GCSurplus Solution Administrator users to retrieve and display records associated with a Customer Profile selected by GCSurplus Solution Administrator users of all attempted credit card payments by that Customer user.	5		
UAA-4	M at go-live	The solution must provide the functionality for GCSurplus to manage all user accounts (for GCSurplus, Clients and Customers), including at a minimum the following actions: - account activation; - account suspension and removal; - password re-set; - manage account access rights - this functionality must allow for setting and management of tiered levels of user access rights to system functionality at the individual user level and at the user group level; and - view record of user activities per account.	5		
UAA-5	M at go-live	**Customer Registration** The solution must provide the functionality for interested buyers to register online for a Customer user account in a user-friendly manner (e.g. using fillable form fields, drop down menus, radio buttons, pre-defined formats, tips, auto complete, etc.).	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
UAA-5.1	M at go-live	Functionality UAA-5 must provide the functionality to require the Customer to provide the following information at a minimum: - First name; - Surname; - E-mail address (this field must require validation by the Customer prior to allowing Registration, to ensure the correct e-mail address has been provided); - Password (This field must require validation by the Customer prior to allowing Registration, to ensure the correct password has been provided); - Language (this field must allow Customers to select either English or Canadian French as their language of choice); - Street address; - City; - Postal Code (this field must allow Customers to enter Canadian alpha-numeric postal codes or numeric zip code formats); - Province or State; - Country; - Phone number (this field must allow for Canadian and international phone numbers to be entered); - Credit Card number (this field must allow Customers to enter only valid Visa, Mastercard or American Express credit cards); - Credit Card expiry date; and - Credit Card security code.	5		
UAA-5.2	*Desirable*	*Functionality UAA-5 should provide the functionality for Customer users to provide additional voluntary information, including the following:* *- Company name; and* *- Fax number.*	2		
UAA-5.3	M at go-live	Functionality UAA-5 must provide the functionality to require Customers to certify agreement with the GCSurplus.ca Terms and Conditions prior to allowing the new Customer Registration to be submitted.	5		
UAA-5.4	M at go-live	Functionality UAA-5 must provide the functionality for Customer users to re-start or abandon a Registration sessions by providing the functionality to clear all information previously entered in a Customer Registration prior to submission.	5		
UAA-5.5	M at go-live	The solution must record the Customer Registration date (the date the Customer was first registered in the solution).	5		
UAA-5.6	M at go-live	Functionality UAA-5 must validate the registering Customer as a unique individual and must include measures to prevent against fraudulent purchases.	5		
UAA-5.6.1	M at go-live	Following successful registration and Customer user login to his/her user account, Functionality Customer-8.1 must provide the functionality for Customer users to view, edit** and save** updates to their Customer Registration information for all fields identified in item UAA-5.1. **When a Customer user has current bids on Sales Listings that have not closed or Sales (Awarded Items) for which payment has not been received by GCSurplus (together considered as “open Sales”), the solution must not allow the Customer user to edit his/her account information until the Status of Sale is ‘completed’ (i.e. Sales Listing has cloased and been awarded to another Customer or Sales Listing has been awarded to the Customer user and payment has been received by GCSurplus).	5		
UAA-5.7	M at go-live	Functionality UAA-5.6.1 must require the Customer user to re-validate his/her credit card when making a change to the Customer user's address recorded in the solution. This functionality must validate the Customer user's address by applying Address Verification System (AVS) validation with the Customer's credit card company.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
UAA-5.7.1	*Desirable*	*The solution should provide the functionality for Customer users to identify characteristics in their Customer profile e.g. Registered with the Controlled Goods program, certified to purchase scuba equipment, Customers authorized to purchase fire extinguishers, tax exempt status, etc.) with access rights for GCSurplus users to review, validate and modify these characteristics.*	2		
UAA-5.7.2	M at go-live	The solution must provide the functionality for Customer users to configure, re-configure and save their individual user account settings for the following functions at a minimum: - Allow the Customer to configure how he/she receives notifications and messages about his/her user account. At a minimum this must include the following configurable options: o Ability to opt in/out of receipt of e-mail notifications from the solution that relate to the Customer user's previously identified "favourites"; o Ability to opt in/out of receipt of special notices from GCSurplus; o Ability to select the format of notices received (Formats must include HTML and plain text).	5		
UAA-5.7.3	M at go-live	The solution must provide the functionality for Customer users to “select all” and “clear all” previously selected parameters when configuring his/her account settings.	5		
UAA-5.8	M at go-live	The solution must provide the functionality for Customer users to select and action the following options: a) cancel and submit cancellation of their Customer user account; or b) return to their Customer user account without cancelling their account.	5		
UAA-5.8.1	M at go-live	Functionality UAA-5.8 must revoke Customer user access to the Customer’s user account but retain Customer user account records within the solution for access by GCSurplus for a defined time period (configurable by GCSurplus). Following this defined period the solution must permanently delete all information relating to this Customer user.	5		
UAA-5.10	M at go-live	The solution must provide the functionality for GCSurplus users to create Customer profiles on behalf of Customers and send Customer login and password information to a Customer.	5		
UAA-6	M at go-live	**Client Registration** The solution must provide the functionality for new Federal Client users to register, modify and cancel his/her own individual user profile in the solution.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
UAA-6.1	M at go-live	The solution must provide the functionality for new Federal Client users to self-register, capturing the following information (at a minimum) in a user-friendly manner (e.g. by drop down menus, radio buttons, free form text entry, auto complete, etc.): - Login (this field must require validation by the solution to validate that the requested Login is unique); - Password (this field must require validation by the Client user prior to allowing Registration, to ensure the correct password has been provided); - Consignee code (this field must require validation by the solution to ensure the identified Consignee code is recognized by the solution); - Default Asset Region; - Language Preference (must provide the choice between English or Canadian French) - (optional data entry); - E-Mail format (must provide the choice between HTML/Enhanced or Text/Plain) - (optional data entry); - Identify Client User's ability to add enhanced images to Sales Requests (must provide the choice between toggle on/off by Federal Client user) - (optional data entry); - First Name; - Last Name; - Phone number; - Extension (optional data entry); - Fax (optional data entry); - E-Mail Address (must require validation by the Federal Client user to ensure the correct e-mail address is provided); - Address; - City; - Province; - Postal Code; - First Name of Client user Manager; - Last Name of Client user Manager; and - E-mail address of Client Manager (this field must require validation that the e-mail address entered is unique from the entered Client user e-mail address and is a valid e-mail address ending in the extension .gc.ca).	5		
UAA-6.2	M at go-live	The solution must provide the functionality to require Client users to certify agreement with the GCSurplus.ca Terms and Conditions prior to allowing the New Federal Client user Registration to be submitted			
UAA-6.3	M at go-live	The solution must provide the functionality for users to cancel their registration or modification of their registration prior to submitting the registration.	5		
UAA-6.4	M at go-live	The solution must provide the functionality to automatically send a verification e-mail to the requesting Client user to activate their Registration. The verification e-mail must clearly identify the New Federal Client user registration to which it pertains and must provide the functionality for the Client user to electronically verify the Registration in the e-mail. Upon verification by the Client, the solution must provide the functionality to display a message to the Client that the Registration has been Verified. In the event of subsequent Registration verification attempts, the solution must provide the functionality to display a message to the Client updating the account status as either "already verified".	5		
UAA-6.5	M at go-live	Following verification of a New Federal Client user Registration, the solution must provide the functionality to automatically send an authorization e-mail to the identified Client Manager to request his/her authorization to activate the Client user's Registration. The authorization e-mail must clearly identify the New Federal Client user Registration to which it pertains and must provide the functionality for the Client user's identified Manager to electronically authorize or reject the Registration.	5		
UAA-6.5.1	M at go-live	Upon authorization by the Client user's identified Manager, the solution must provide the functionality to display a message to the Client Manager that the Registration has been Authorized. In the event of subsequent Registration authorization attempts, the solution must provide the functionality to display a message to the identified Client Manager updating the account status as either "already authorized".	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
UAA-6.5.2	M at go-live	Upon rejection by the Client user's identified Manager, the solution must provide the functionality to display a message to the Client Manager that the Registration has been Rejected.	5		
UAA-6.6	M at go-live	The solution must not allow non-Federal Clients to self-register. In the event a non-Federal Client attempts to self-register, the solution must provide the functionality to display a message to the user with an alert and instruction on how to contact GCSurplus for registration.			
UAA-6.7	M at go-live	The solution must not allow GCSuplus users to add a new Federal Client user profile.	5		
UAA-7	M at go-live	The solution must provide the functionality for users to send an electronic request to GCSurplus Solution Administrator users to automatically retrieve their forgotten password for their user account. This functionality must be based on uniquely identifying user information (e.g. e-mail address) and prohibit unauthorized access to users' passwords by persons other than the individual user.	5		
UAA-7.1	M at go-live	The solution must provide the functionality for all users to edit and save an update to his/her password. This functionality must: - require the user to enter their unique user id (e.g. e-mail address) and existing password and perform validation to ensure the password that will be changed by this function is the correct password; - require validation by the user prior to allowing any update to be saved, to ensure the correct new password has been provided; and - allow the user to cancel a change to his/her password before it is submitted and return to his/her user account.	5		
UAA-7.2	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to force all Client users to re-set passwords on a periodic basis (with the time period configurable by GCSurplus).	5		
UAA-8	M at go-live	The solution must provide a "My Account" functionality for every user providing the functionality for each user to set, modify and re-set account settings, including the functionality to select from among available default values in the solution. This must include at a minimum: - Functionality for all users to set Language of preference for solution interfaces (choice of: English and Canadian French); - Functionality for Client users to set default location(s) for asset declarations in SRs (choice of: Client location and GCSurplus Region); - Functionality for Client users and GCSurplus users to identify default contact name and address, including the functionality to add additional contact names and contact addresses for the user's account; - Functionality to toggle options (e.g. view / not view) within the user's account; - Functionality to view , modify and save configurable settings for reports accessible to the user within their account.	5		
		Customer "My Account"			

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
CMA-1	M at go-live	Once the Customer user is logged in, the solution must provide the functionality for the Customer user to quickly access and action the following functions: - Customer logout; - Manage Customer user's registration; - Browse/search Sales Listings; - Browse/search Sold items (completed/closed Sales Listings for items that have been sold); - View the Customer user's current bids; - View the Customer user's past bids; - View the Customer user's awarded items; - View messages posted by GCSurplus; - View messages specific to the Customer user's individual account status created based on business rules (e.g. items not paid in full, etc.); and - Navigate to other important site content or external websites.	5		
CMA-1.1	M at go-live	The solution must provide the functionality for the Customer user to view a summary record in real time of all bids he/she has submitted for 'active' Sales Listings. The solution must provide the functionality to display the following information to the Customer user for each Current Bid record, at a minimum: - Customer user Bid Amount; - Item description; - Minimum Bid Amount; - Current Bid Amount; - Posted date and time of Sales Listing; - Closing date and time of Sales Listing; - Time remaining prior to Closing date and time of Sales Listing (this must be updated dynamically, or as of time of the Customer's search); - Location of Item (city and province only); and - Sales Account number; and - The solution must provide the functionality to display records for each Current Bid with an image of the Item co-located with the minimum defining information for the Sales Listing.	5		
CMA-1.1.1	M at go-live	The solution must provide the functionality for the Customer user to toggle the order in which the results are displayed, using any of the following fields: - Item description; - Sale Account number; - Posted date of Sales Listing; - Closing date of Sales Listing; and - Location of Item (city and province only). The solution must provide the functionality for Customer users to toggle the number of Current Bid records to be displayed at one time in the interface.	5		
CMA-1.1.2	M at go-live	The solution must provide the functionality for the Customer user to select each Current Bid records to view the associated detailed Sales Listing and to modify his/her bid (prior to the Closing date and time of the Sales Listing).			

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
CMA-1.2	M at go-live	The solution must provide the functionality for the Customer user to view a summary record of all bids he/she has submitted for 'Sold' Sales Listings ("Past Bids"). The solution must provide the functionality to display the following information to the Customer user for each Past Bid record, at a minimum: - Sold Amount and Status of Sale (e.g. "in progress" "sold", etc.); - Customer Bid Amount; - Item description; - Posted date and time of Sales Listing; - Sold On date; - Location of Item (city and province only); and - Sales Account number; and - The solution must provide the functionality to display an image of the Item co-located with the minimum defining information.	5		
CMA-1.2.1	M at go-live	The solution must provide the functionality for the Customer user to toggle the order in which the results are displayed, using any of the following fields: - Item description; - Sale Account number; - Posted date of Sales Listing; - Closing date of Sales Listing; and - Location of Item (city and province only). The solution must provide the functionality for the Customer user to limit the number of Past Bid records to be displayed in the interface based on the number of months that have passed since the Bid, as identified by the Customer user. The solution must provide the functionality for the Customer user to re-set the number of months and refresh the display of Past Bids accordingly. The solution must provide the functionality for the Customer user to toggle the number of Past Bid records to be displayed at one time in the interface.	5		
CMA-1.2.2	M at go-live	The solution must provide the functionality for the Customer user to select each Past Bid record for each Item the Customer has bid on to view the Post Sale Record.			
CMA-1.3	M at go-live	The solution must provide the functionality for the Customer user to view a record of a Sold Item (Post Sale Record) for any closed Sales Listing (whether the Item was Sold or the Sale was cancelled). The solution must provide the functionality for Post Sale Records to display the following information at a minimum: - Sold Amount and Status of Sale; - Customer user Bid Amount (if the Customer user had submitted a Bid and if the Customer user is logged in to his/her account); - Item description; - Closing date and time of Sales Listing. *For Sold Items, if the Customer user had the highest Bid Amount and was awarded the Sale, the solution must provide the functionality to highlight the Customer Bid Amount.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
CMA-1.4	M at go-live	The solution must provide the functionality for the Customer user to view a Summary of all Sales which have been Awarded to the Customer user. The solution must provide the functionality for Summary results for each Awarded Item to display the following fields and defining information at a minimum: - Customer user Bid amount ($); - Date and time of Award. - Sales Account number; - Item description; - Sales Representative (including name, phone number and e-mail address); and - the solution must provide the functionality to display an image of the Item co-located with the minimum defining information.	5		
CMA-1.4.1	M at go-live	In addition to CMA-1.4, for Awarded Items where the Customer user's Award has been subsequently Rejected by GCSurplus, the solution must provide the functionality for the Customer user to access, view and print a notice of rejection including the date and reason for rejection of the Award by GCSurplus.			
CMA-1.4.2	M at go-live	In addition to CMA-1.4, for Awarded Items where payment is outstanding by the Customer user ("Not Paid"), the solution must provide the functionality for the Customer user to: - Access, view and print the Invoice associated with the Awarded Item; - Apply payment to the Invoice associated with the Awarded Item; and - Identify the Removal Date for the Item.	5		
CMA-1.4.3	M at go-live	In addition to CMA-1.4, for Awarded Items which have been Paid in Full by the Customer user ("Paid in Full"), the solution must provide the functionality for the Customer user to: - Access, view and print the Invoice associated with the Awarded Item; - Identify the Payment status as Paid in Full and date of Payment; - Identify the Removal Date for the Item (if not already removed by the Customer user); - Access, view and print the Bill of Sale associated with the Awarded Item; - Access, view and print the Authorization to Release associated with the Awarded Item; and - Provide instructional text to the Customer user on what they require to pick up the Item.	5		
CMA-1.4.4	M at go-live	In addition to CMA-1.4 the solution must provide the functionality for the Customer user to display all or a sub-set of his/her Awarded Items based on the Status of Sale (i.e. Not Paid, Paid in Full, Rejected). The solution must provide the functionality for the Customer users to limit the number of Awarded Item records to be displayed in the interface based on the number of months that have passed since the Award, as identified by the Customer user. The solution must provide the functionality for the Customer user to re-set the number of months and refresh the display of Awarded Items accordingly.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
CMA-2	M at go-live	The solution must provide a **Customer Message Centre** functionality for Customer users to view, save, print and delete messages sent to the Customer user by GCSurplus. This functionality must provide the functionality for the Customer user to display a summary of Customer user Messages, including the following at a minimum: - Message Subject; - Date and time of Message issue; - Date and time the Customer viewed the Message; This functionality must provide the functionality for the Customer user to access each Message identified in the summary of Customer Message individually. This functionality must provide the functionality to require the Customer user to acknowledge he/she has read the Message prior to allowing the Customer user to delete a Message. This functionality must provide the functionality to alert the Customer user when there is an unread message in their Customer Message Centre and allow the Customer to access the Message Centre from the Alert.	5		
CMA-3	M at go-live	The solution must provide the functionality for Customer users to add and remove any Live Sales Listing to a unique "watch list" which will alert the Customer when an activity (e.g. Bid placed, # min. before Sales Listing Closing, Sales Listing closed, Sales Listing cancelled etc.) associated with that Sales Listing occurs.	5		
CMA-3.1	M at go-live	Functionality CMA-3.1 must provide the functionality for Customer users to view his/her "watch list" and link directly to the specific Sales Listings included in the Customer's "watch list".	5		
CMA-3.1	*Desirable*	*The solution should provide the functionality to provide electronic alerts to Customer users that are configurable by the Customer user based on their identified preferences (e.g. If a Customer user is searching for a particular item in one (1) Region, the solution would provide an alert to the Customer user if the particular item is available in another Region for which the Customer has identified a preference or "favourite").*	2		
		"Message Centre"			

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
MC-1	M at go-live	The solution must provide a Message Centre functionality for Client users and GCSurplus users to view, save, print and delete messages received from other Client users and GCSurplus users and to create and send messages to other Client users and GCSurplus users within the solution. The Message Centre function must provide the functionality to display a summary of the user's Messages, including the following at a minimum: - Message Subject; - Date and time of message Issue; - Date and time the user viewed the Message; The Message Centre function must provide the functionality for the user to access each message identified in the summary of user Messages individually. The Message Centre function must provide the functionality for the user to acknowledge he/she has read the message prior to allowing the user to delete the message. The Message Centre must provide the functionality to alert the user when there is an unread message in the Message Centre and allow the user to access the Message Centre from the Alert.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
MC-2	M at go-live	The Message Centre function must provide Client users and GCSurplus users with the functionality to add, modify, save and delete location addresses to efficiently populate Addresses in subsequent Sales Requests and Sales Listings created by the user in the solution. The solution must provide the functionality for the user to enter Address Book entries in the following fields in a user-friendly manner (e.g. by drop down menus, radio buttons, free form text entry, etc.): - Consignee Code; - Nickname; - Address; - City; - Province; - Postal Code. The solution must provide the functionality for the user to save a new or modified Entry, cancel an Entry that has not yet been saved and return to a Summary list of the Address Book, and re-set a modified Entry to the form it was in prior to the user making any modifications in the current session. The solution must provide the functionality to display a Summary list of Address Book entries sorted alphabetically, providing, at a minimum the following: - Nickname of addressee; - Address; - City; - Province. The solution must provide the functionality for the user to search the Summary list of Address Book entries by free form text entry and return a summary of the search results. The solution must provide the functionality for the user to select and retrieve the detailed Address Book Entry for the selected Entry from the Summary list of Address Book entries.	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
MC-3	M at go-live	The Message Centre function must provide Client users and GCSurplus users with the functionality to add, modify, save and delete Client and GCSurplus contacts to efficiently populate user solution interfaces requiring contact information. The solution must provide the functionality for the user to enter Contact List Entries in the following fields in a user-friendly manner (e.g. by drop down menus, radio buttons, free form text entry, etc.): - Full Name; - E-Mail Address; - Phone Number; - Extension (optional data entry); - Fax (optional data entry). The solution must provide the functionality for the user to save a new or modified Entry, cancel an Entry that has not yet been saved and return the user to a summary list of the Contact List, and re-set a modified Entry to the form it was in prior to the user making any modifications in the current session. The solution must provide the functionality to display a Summary list of entries sorted alphabetically, providing, at a minimum the following: - Full Name; - E-mail address; - Phone number. The solution must provide the functionality for the user to search all entries by free form text entry and return a summary of the Contact List search results. The solution must provide the functionality for the user to select and retrieve the detailed Contact List Entry for the selected Entry from the Summary list of Contact List entries.			
		Reporting & Business Intelligence			
BI-1	M at go-live	The solution must provide the functionality for users to generate reports on any and all data that is viewable to that type of user in the solution in real time.	5		
BI-1.1	M at go-live	The solution must provide the functionality for GCSurplus users (with access rights) to conduct full access query on the data tables in the application.	5		
BI-2	M at go-live	The solution must provide the functionality for GCSurplus users for a robust business intelligence capability with a third party plug in through the solution's web interface. This function must allow read only access and query functionality.	5		
BI-3	M at go-live	The solution must provide the functionality for all reports to be viewed, saved, printed, and transmitted from within the solution.	5		
BI-4	M at go-live	The solution should provide a reporting module/centre functionality for GCSurplus users to customize and build reports by selecting from among any available data fields and row and column formats. This functionality should provide the functionality for GC Surplus users to save how reports have been formatted (e.g. "my reports") to generate additional reports using different data in the same format.	5		
BI-5	M at go-live	The solution must provide the functionality for all Reports to be viewed by the user within the solution's web interface and the functionality to save reports as .pdf or .xls format.	5		
BI-6	*Desirable*	*The solution should provide the functionality for GCSurplus users (with access rights) to view, save, print and transmit all reports in a graphical format.*	5		

#	Req Code	Requirement Description	Total Pts	Pg Ref	Bidder Response
BI-7	M at go-live	The solution must provide the functionality for GCSurplus Finance users to generate, view, save, print and transmit and record invoice reports to Clients, including detail on any chargebacks included in the invoice at the Item level.	5		
BI-8	M at go-live	The solution must provide the functionality for GCSurplus Finance users to generate, view, save, print and transmit and record invoice reports to Clients, including detail on any chargebacks associated with GCSurplus services to the Client's account.	5		
BI-9	M at go-live	The solution must provide the functionality for Customer users to print any of the following records from their user account: - Summary Sales Listing Search Results; - Detailed Sales Listing; - Bid Amount (per Item); - Confirmed Bid Amount (per Item); - Summary of Awarded Items; - Summary of Current Bids; - Summary of Past Bids; - Post Sale Record (for Sold Items, if the Customer had the highest Bid Amount and was awarded the Sale); - Invoice for Awarded Item; - Bill of Sale for Awarded Items that are Paid in Full; - Authorization to Release for Awarded Items that are Paid in Full; - Customer Registration.	5		
Common reporting requirements will be defined with the Contractor. The following items identify anticipated requirements for illustrative purposes:					
R-1	*Desirable*	*The solution should provide the functionality for GCSurplus users to report on “transaction history” by item, by Consignee, by Client, by Region, and by Sales Representative over a variety of time periods (e.g. To date of report date, by month, by quarter, by year, and month over month, quarter over quarter, year over year, etc.)*	2		
R-2	*Desirable*	*The solution should provide the functionality for GCSurplus users to report at the transaction level and in a roll-up by consignee, Client, and Region: - what item(s) have sold, - to whom, - by whom, - date of sale, - value of sale, - taxes applied to the sale, - description of item - value of commission withdrawn by GCSurplus, and - net proceeds of sale to end Client.*	2		
R-3	*Desirable*	*The solution should provide the functionality for GCSurplus users to report on the volume of sales, how many sales per day, the value of commission associated with each sale and the value of commission overall; value of sales, and date of sales by Sales Representative, by Region, by consignee and by Client*	2		
R-3.1	*Desirable*	*The solution should provide the functionality for GCSurplus users to view, save, print and transmit reports on workload by Sales Representative based on the quantity of sales assigned.*	2		
R-4	*Desirable*	*The solution should provide the functionality for GCSurplus users to report on the number items or commodities sold in a specific time period, by Client department. This functionality should provide the functionality for the user to identify one (1) or more commodities and item categories.*	2		

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R-5	*Desirable*	*The solution should provide the functionality for GCSurplus users to record and track sales budgets over a period of time, including performance (sales) and expenses against budgets. This functionality should be configurable by GCSurplus users to report for a variety of time periods (e.g. monthly, quarterly, annually, to date).*	2		
R-5.1	*Desirable*	*The solution should provide the functionality for GCSurplus users to view, save, print and transmit reports on the performance of individual Sales Listings, including: Minimum bid amount, expected sales price, actual sales price. This functionality should be provided with the ability to roll-up Sales Listing performance by Sales Representative, by Region, by Commodity.*	2		
R-6	*Desirable*	*The solution should provide the functionality for GCSurplus users to view, save, print and transmit reports on trends of revenues, e.g. year to year, etc. and allow comparison of revenues year over year, monthly, quarterly etc. by commodity, by Client department, by Region, by month (e.g. month over month), by location*	2		
R-7	*Desirable*	*The solution should provide the functionality for GCSurplus users to view, save, print and transmit reports on Customer user analytics. This functionality should include a variety of analytics including Region/location of Customer users, time spent on a Sales Listing, navigation path, etc., and be reported by Sales Listing and in aggregate over the registered Customer base by a variety of variables (e.g. by commodity/Item, Region, number of registrations, etc.).*	2		
R-7	*Desirable*	*The solution should provide the functionality for GCSurplus users to view, save, print and transmit reports on Customer trends (e.g. Customers who purchase more than $X/year, Customers with repeat bids per item, track patterns of behaviour which indicate the potential for fraud (e.g. for Customers with multiple accounts,) etc.)*	2		
R-8	*Desirable*	*The solution should provide the functionality for GCSurplus users to view, save, print and transmit reports on "case" status (e.g. Open Sales Requests, Open Sales Listings, etc.) with identification of processes and activities pending or not completed. This functionality should provide the functionality to report on status at a "year to date" or configurable time period "to date" level by Sales Representative and by Region.*	2		
R-9	*Desirable*	The solution should provide the functionality for GCSurplus to track and report on activity associated with individual Sales Listings (e.g. Number of views, number and value of bids, time remaining, etc.)	2		
R-9.1	*Desirable*	Functionality R-9 should provide the functionality to track and report on activity associated with individual Sales Listings/Sales Notices in real time.	2		
R-10	*Desirable*	*The solution should provide the functionality for GCSurplus users to record, track, view, save, print and transmit reports on cost per Sale vis-a-vis revenue and commission from Sales. This functionality should be provided at a transaction (Sales Request) level and at an item level; by consignee, by Client and by Region.*	2		
R-11	*Desirable*	*The solution should provide additional formats for Reports (e.g. ASP.net, .net)*	2		
		Solution Support			
S-1	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to provide GCSurplus users with guidance material on the use of the solution (e.g. 'how to's'; FAQs, checklists; help buttons; tool tips; web tutorials, etc.) that are accessible to GCSurplus users from within the solution.	5		
S-2	M at go-live	The solution must provide the functionality for GCSurplus Solution Administrator users to publish FAQs that are viewable by user group.	5		
S-3	M at go-live	The solution must provide the functionality to automatically notify GCSurplus users of updates or changes to the features and functionality of the solution.	5		

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S-6	*Desirable*	*The solution should provide the functionality for GCSurplus to develop and publish additional guidance material to Client users that is accessible from within the solution (e.g. notifications on changes in business process or policy, checklists, how to's, instructional materials, etc.).*	2		
S-8	*Desirable*	*The solution should provide the functionality for GCSurplus users to "ghost" view a Client department's user account.*	2		
S-10	*Desirable*	*The solution should provide an online forum functionality accessible for each of Client users and Customers users on the use of the system. This functionality must provide the functionality for GCSurplus Solution Administrator users to moderate the forum or to delay publication of messages until approved by a GCSurplus Solution Administrator user.*	2		
		Solution Templates			
ST-1	M at go live	The solution must provide at a minimum 30 standardized SR templates configured to capture and display Item defining information (data fields) based on the commodity and sub-commodity group (e.g. templates for high return commodities, high volume commodities, etc.).	5		
ST-1.1	*Desirable*	*The solution should provide the functionality for GCSurplus users to build and deploy within the solution standardized SR and Sales Listing templates which can be configured by GCSurplus users to capture and display asset information (data fields) based on the commodity and sub-commodity group (e.g. templates for high return commodities, high volume commodities, etc.).*	2		
ST-2	*Desirable*	*The solution should provide the functionality for GCSurplus users to create and publish (within the solution) templates for SRs and Sales Listings with configurable fields (mandatory, optional) and format(s) (drop down, look-up, radio buttons, freeform text entry, etc.) for use by other GCSurplus users (Sales Requests and Sales Listings) and Client users (Sales Requests only).*	2		
ST-3	M at go-live	The solution must provide all required solution templates which provide mandatory data entry fields (those requiring user data input prior to submission) and optional data entry fields (those not requiring user data input prior to submission).	5		
ST-3.1	*Desirable*	*Functionality ST3 should provide the functionality for GCSurplus users to configure data entry fields as either mandatory (requiring user data input prior to submission) or optional (not requiring user data input prior to submission).*	2		
ST-4	M at go-live	The solution must provide all required solution templates in a manner that structures data fields appropriate to the type of user input required (e.g. Free-form text entry, alpha-numeric, numeric, defined numeric format, etc.). Configuration must provide a user-friendly data entry format, minimizing keystrokes and re-entry of tombstone data.	5		
ST-4.1	*Desirable*	*Functionality ST4 should provide the functionality for GCSurplus users to structure data entry fields appropriate to the type of user input required (e.g. Free-form text entry, alpha-numeric, numeric, etc.).*	2		
ST-5	M at go-live	The solution must provide the functionality to validate user data entry (e.g. any mandatory fields incomplete, data entry format incorrect, etc.) in all solution templates.	5		
ST-6	M at go-live	The solution must provide the functionality (e.g. WSISG Text Editor) to force formatting of Client user and GCSurplus user input or automatically modify the formatting presentation of all free form text entered in the solution's SR and Sales Listing templates (e.g. left justified, bulleted lists, etc.) to a format that complies with the TB Standard on Web Accessibility.	5		

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ST-7	*Desirable*	*The solution should provide the functionality for Client and GCSurplus users to lookup and convert units of measurement (e.g. Imperial to metric) to force consistency within the same SR and within the same Sales Listing.*	2		
ST-8	M at go-live	The solution must provide the functionality for GCSurplus HQ users to develop, store and access for later selection by GCSurplus users and publication in Sales Listings a library of clauses.	5		
ST-9	*Desirable*	*The solution should provide additional user-friendly functionality in templates and online interfaces (e.g. "smart logic" driven forms/fields which present users with questions based on their answer to previous data fields, etc.).*	2		
		Solution Architecture and Navigation			
CASS-5	M at go-live	All GUIs and all solution functionality must be fully accessible and functional via a web browser. This must include, at a minimum: IE, Firefox, Chrome.	5		
CASS-6	M at go-live	All GUIs and all solution functionality must be fully accessible and functional via a mobile platform. This must include, at a minimum: Apple OS, Blackberry OS, Android.	5		
CASS-7	**M at time of Proposal**	The solution must provide the functionality for all users to view the publicly accessible website and to access all functionality associated with their individual user account (and any/all links/attachments therein), and to complete all actions in the solution from within a web browser without requiring any additional software or viewers, in conformity with web browser accessibility standards..			
CASS-8	**M at time of Proposal**	The solution must provide the functionality for user data entry in a user-friendly manner (e.g. by drop down menus, radio buttons, free form text entry, etc.) and smart forms, using forward chaining logic which presents options and subsequent questions only where required, based on business rules.			
CASS-9	**M at time of Proposal**	The solution must provide a Service Oriented Architecture.			
CASS-10	**M at time of Proposal**	The solution architecture and connectivity must currently conform to or be readily adaptable to meet the requirements of the following Acts, policies and standards (refer to the hyperlinks below): • Privacy Act • Access to Information Act • Government Security Policy • Management of Information Technology Policy • Policy on the Management of Government Information • Management of Information Technology Security (MITS)			
CASS-11	*Desirable*	*The solution should provide in all dashboard functionalities a variety of user-friendly icons that are readily accessible and easy to understand to depict the status of actions and files.*	2		
CASS-12	M at go-live	All solution user interfaces must be available in English and Canadian French.	5		
CASS-13	M at go-live	The solution must present its interfaces to users in the language interface (English or Canadian French) that corresponds to the user's previously identified Language of choice.	5		
CASS-14	M at go-live	All logins requested by users must be validated by the solution to ensure their uniqueness prior to allowing a user to employ the identified login. In the event the login requested is not unique, the solution must send the user an alert to modify the requested login.	5		

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CASS-15	M at go-live	All passwords must be strong and hashed prior to transmission and storage in the solution via the MD5 encryption algorithm.	5		
CASS-16	M at go-live	All passwords must be SHA256 encrypted when stored in the solution.	5		
CASS-17	M at go-live	The solution must not retain any credit card information (number, expiry date and security code).	5		
CASS-18	M at go-live	The solution must provide SSL security encryption on all Customer payment transmissions via credit card.	5		
CASS-19	M at go-live	The solution must be fully accessible via online interfaces that currently conform to or are readily adaptable to the following Web Standards (online at: http://www.tbs-sct.gc.ca/ws-nw/index-eng.asp): • Standard on Optimizing Websites and Applications for Mobile Devices • Standard on Web Interoperability • Standard on Web Usability • Standard on Web Accessibility	5		
CASS-20	*Desirable*	*The solution should provide autocorrect functionality for spelling and errors in data entry.*	2		
CASS-21	M at go-live	The solution must provide the functionality for GCSurplus users and Client users to readily identify on a per SR basis and in aggregate any and all "bring forwards" - i.e. when key dates or key activities associated with an item/file are upcoming, pending, and overdue and to send electronic alerts for action to the appropriate user.	5		
CASS-22	M at go-live	The solution must provide the functionality to display the total number of records as well as the number of records displayed in the open window and number of records filtered by the solution in all search results.	5		