

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

**SOLICITATION AMENDMENT**  
**MODIFICATION DE L'INVITATION**

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

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

**Comments - Commentaires**

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

**Issuing Office - Bureau de distribution**  
**Mainframe & Business Software Procurement Division**  
**/ Div des achats des ordi principaux et des logiciels de**  
**gestion**  
**11 Laurier St. / 11, rue Laurier**  
**4C1, Place du Portage III**  
**Gatineau**  
**Quebec**  
**K1A 0S5**

<b>Title - Sujet</b> GCDOCS MIGRATION TOOL	
<b>Solicitation No. - N° de l'invitation</b> EN869-141670/A	<b>Amendment No. - N° modif.</b> 006
<b>Client Reference No. - N° de référence du client</b> 20141670	<b>Date</b> 2014-09-08
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$EEM-006-27829	
<b>File No. - N° de dossier</b> 006eem.EN869-141670	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2014-10-06</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Quenville, Elizabeth	<b>Buyer Id - Id de l'acheteur</b> 006eem
<b>Telephone No. - N° de téléphone</b> (613) 937-2727 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b>	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

**Amendment No. 006**  
**Solicitation No. EN869-141670/A**  
**Occupational Safety and Health E-Learning Solution (OSHELS)**

The purpose of this amendment is to:

- 1) respond to questions relating to this bid solicitation as detailed in Section A; and,
- 2) to modify the Bid Solicitation, as detailed in Section B.

**SECTION A - QUESTIONS AND ANSWERS**

#	Question	Answer
18	<p>Ref: Bid Solicitation, Annex A, Statement of Requirements, Rated Requirement R-12: The intent of this RFP is to allow the Crown to acquire a 'tool' that will migrate information from legacy repositories into GCDoc's as the end state. In R-12, a heavy onus is being put on the credentials of both the 'Firm' and the 'Resource' to have the specific 'end state' (OpenText) certifications as substantiation of corporate capability to deliver, enable and support an FDMSSS, even though the "Tool" and 'Resource' being proposed will be working not only with CGDocs but also with various legacy repositories.</p> <p>We respectfully request the Crown to have R-12 removed from the rated requirements as this supports only those firms who are proposing a specific OpenText tool solution, and promotes a disadvantage for those firms that have a robust solution regardless of what repositories are being accessed on either end of the migration tool.</p>	Please see Solicitation Amendment 6 modification number 1, below.
19	<p>Ref: Bid Solicitation, Annex A, Statement of Requirements, Rated Requirement R-11: Rated requirement R11 awards 5 points for each migration project of 50,000 documents for client groups of 250 or more users within the last three years. We would like to suggest the Crown offers the ability to award more technical points to firms who have delivered larger and more complex projects similar to the size and scope of PWGSC. We request that a reference experience that have migrated 100,000 documents be considered as two projects and 250,000 documents be considered as five</p>	Please see Solicitation Amendment 6 modification number 2, below.

	projects respectfully. As written currently, the Crown will award max points to a firm who have delivered several small projects rather than to a firm who has migrated a similar quantity of documents for a client of similar size and complexity as PWGSC.	
20	Ref: Bid Solicitation, Page 1, Bid Closing Date: We would like to ask for a three week extension as the response to the above questions could alter our strategy in responding to the RFP.	The Bid Closing Date is hereby extended to Monday, October 6, 2014 at 2:00pm EDT.
21	Ref: Bid Solicitation, General: Is there an incumbent firm or solution who have delivered a proof of concept in advance of this RFP?	No, there is not an incumbent firm or solution who has delivered a proof of concept in advance of this RFP.
22	Ref: Bid Solicitation, Annex A, Statement of Requirements, Mandatory Requirement M-14 and Rated Requirement R-11: R-11 awards 5 points for each migration project of 50,000 documents for client groups of 250 or more users, and 100,000 documents for client groups of 500 respectively, within the last three years. These are unusually small migrations. We believe this unfairly penalizes firms that have undertaken larger, more complex projects. We request that PWGSC prorate the experience so that a migration of 100,000 documents be considered two projects, a migration of 150,000 documents be considered three projects etc.	Please see Solicitation Amendment 6, modifications number 2 and 3, below.
23	Ref: Bid Solicitation, Annex A, Statement of Requirements, Mandatory Requirement M-9: M9 specifies that resource creation must take place using the OpenText Content Server Web Services API; is there a reason that functionally equivalent interfaces (such as WebDAV and the OpenText bulk loader service) are excluded? We notice that in answer 7 amendment 004 you do not require the eDocs API to be used.	<p>PWGSC leaves it up to the Bidder/proposed Solution to define how information is to be extracted from the file system or from eDOCS.</p> <p>The use of Content Server Web Services API enables the solution to be installed on any desktop and migration to be performed from a normal desktop. Web Services also permits extended metadata to be migrated, something WebDav does not perform. Metadata migration is a mandatory requirement as per M-2 and M-3 of the Statement of Requirements. The OpenText Object Importer and equivalent tools generally need to run within the Content Server data center, which is in a restricted zone, with no access to the file system or to eDOCS where the source documents are located.</p>
24	Ref: Bid Solicitation, Annex A Statement of Requirements, Rated Requirement R-12: 5 points	Please see Solicitation Amendment 6

	are available to be awarded for Opentext Content Server certification and 5 points are available for eDocs. This represents 25% of the points available to the technical analyst. There are, however, no points available for certification in the software solution being proposed. Requiring Opentext certifications of the Technical Analyst implies that the crown has a preference for an Opentext solution. We request that technical analyst's qualifications be evaluated based on certification with the <u>Solution being proposed</u> , Experience with the relevant repositories can be demonstrated elsewhere.	modification number 1, below.
25	Ref: Bid Solicitation, Annex A Statement of Requirements, Rated Requirement R-12: 10 points are made available if the firm is an Opentext partner. This will unfairly favour firms proposing an Opentext solution. At the same time this will handicap software publishers who compete directly with Opentext.	Please see Solicitation Amendment 6 modification number 1, below.
26	Ref: Bid Solicitation, Page 1, Bid Closing Date: I would like to request an extension to the submission deadline as the answers to our requests may alter our subcontracting and joint venture alliances.	The Bid Closing Date is hereby extended to Monday, October 6, 2014 at 2:00pm EDT.
27	Ref: Bid Solicitation, General: The migration to a new records management system represents an opportunity to clean up the Crown's current records holdings. The RFP in its current form does not evaluate the proposed solution's ability to assist with clean-up of trivial, out-dated information and redundant (duplicate) information. We suggest that the crown add a rated criterion to evaluate these capabilities.	The bid solicitation does not include a requirement for clean-up of trivial, out-dated or redundant information. Canada has considered the request and will not be adding a rated requirement to evaluate these capabilities.
28	Ref: Bid Solicitation, General: We suggest that Canada add criteria for the evaluation of the proposed solution's ability to define and classify facets.	Faceted inclusion would be demonstrated through the identification of duplicates, migration of versions, re-creation/ preservation of links that are included in rated requirements R-1 and R-5 of the Statement of Requirements. Canada has considered the request and will not be adding additional requirements to further evaluate these capabilities.
29	Ref: Bid Solicitation, Annex A Statement of Requirements, Mandatory Requirements M-1 to M-13 and Rated Requirements R1 - R-10: How should requirements M-1 to M-13 and R1 to R-10 be verified? Is a statement of compliance enough?	As per Section 3.2 of the bid solicitation, Section I: Technical Bid, (a), In their technical bid, bidders must demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders must demonstrate

		their capability in a thorough, concise and clear manner for carrying out the work. The technical bid must address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient.
30	Ref: Bid Solicitation, Annex A, Statement of Requirements, Mandatory Requirements M-2 and M-3: M-2 specifies that the solution must preserve source metadata, while M-3 specifies that only a subset of the source fields are to be migrated. Which is accurate?	Both Mandatory Requirements of the SOR, M-2 and M-3, are accurate. M-2 is a macro-level requirement, while M-3 addresses a more specific requirement relating to metadata required to document attributes/metadata.
31	Ref: Bid Solicitation, Annex A, Statement of Requirements, Mandatory Requirement M-3: M3 Identifies Author, document name and creation date as the metadata fields/attributes to be mapped for migrated documents. This seems like a very limited amount of metadata to be captured from official records. Are these the only fields that need to be captured? If so how is the rest of the metadata in Network drives and the eDocs solution to be preserved?	The requirement states "perform a mapping of source metadata fields/attributes to destination metadata fields/attributes – namely, author, document name and creation date." This will demonstrate that the vendor can map attributes from source to the target.
32	Ref: Bid Solicitation, Annex A, Statement of Requirements, Mandatory Requirement M-4: M-4 specifies OpenText eDocs and Network shared drives as source repositories.  1. Which versions and protocols are to be supported?  2. These sources may satisfy PWGSC's immediate needs but this solution will be extended to include other groups, departments and agencies, we suggest that source repositories should be expanded to include exchange servers, PSTs, groupwise, databases, MS Sharepoint and other proprietary systems and archives. These repositories will be critical sources for other departments. This could be a rated requirement.	The technical environment is stated in the Statement of Requirements Section 1.2, Background, and 1.4.3, Technical Environment.  The Solution will not be used for the migration of e-mail nor structured databases and repositories such as SharePoint. The Solution will not be extended to applications such as Lotus or IBM WordPro where there is no Enterprise Connect. These file types are also a small minority of the overall shared drives' contents.
33	Ref: Bid Solicitation, Annex A, Statement of Requirements, Mandatory Requirement M-5: M-5 specifies that the solution must auto-detect the application type and document extensions of documents. Our experience has shown that	PWGSC is not prescriptive in the method used to meet the requirement. Flexibility is given to the Bidder to demonstrate how the proposed Solution resolves differences between the extension, stored

	these two features are often in conflict in the source repositories (eg. HTML files saved with an .xls extension, and Rich Text Format documents saved with .doc extensions.) What method should be used to resolve differences between the extension, stored meta information and actual underlying file types?	meta information and actual underlying file types.
34	<p>Ref: Bid Solicitation, Annex A, Statement of Requirements, Rated Requirement R-1: R-1 states "The Solution should be responsive to the source repository analysis and clean-up requirements by having the functionality to:</p> <p>1. Identify duplicates and near-duplicates (with only iterative differences in content or formatting) across all repositories; (20 points)</p> <p>2. Group similar documents; (10 points)</p> <p>Identify duplicates across which repositories? Is this limited to the Network drives and eDocs environments mentioned? How are similar documents defined?</p>	<p>Duplicates, referenced in R1, are limited to eDRM and shared drive repositories.</p> <p>Please see Solicitation Amendment 6, modification number 4, below.</p>
35	Ref: Bid Solicitation, Annex A, Statement of Requirements, Rated Requirement R-3: R-3 specifies that version migration is to be preserved from source repositories. For repositories which are unable to retrieve versions (such as plain filesystems) can you confirm that this requirement is waived?	Annex A, Statement of requirements, Rated Requirement R-3 has been revised. Please see Solicitation Amendment 6, modification number 5, below.
36	Ref: Bid Solicitation, Annex A, Statement of Requirements, Rated Requirement R-6: R-6 assumes a process where the content is copied not moved, in order to receive points. How are points awarded in the event that the content is moved?	It is correct that R-6 assumes a process where content is copied and not moved. The definition of migration, as per the Oxford Dictionary, is "to move from one part of something to another". The act of migration implies that content is "moved". No points will be awarded in the event that content is moved but not copied.
37	Ref: Bid Solicitation, Annex A, Statement of Requirements, Mandatory Requirement M-15 and Rated Requirements R-12 and R-13: The RFP evaluates the experience of a single Technical Analyst, there is no requirement to use	No, it is not acceptable to propose a team of resources rather than the experience of a single Technical Analyst. As per Section 4.2(e) of the bid solicitation, entitled "Number of Resources Evaluated", only one resource will be evaluated as part of this bid solicitation as

	<p>this analyst in future call ups - can we propose a team of resources instead?</p>	<p>identified in Annex A. Additional resources will only be assessed after Contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 - Resulting Contract Clauses, the Article titled "Task Authorization".</p> <p>When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form's Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract's Statement of Requirements in accordance with Annex A. The requirement is to demonstrate the experience of one technical analyst.</p> <p>As for other types of resources, the GCDOCS project team holds the required business analysts, project managers and subject matter experts to fulfill the migration team requirements. A technical analyst is required from the Bidder to transfer knowledge of the Solution to PWGSC internal technical resources.</p>
38	<p>Ref: Bid Solicitation, General: The RFP evaluates the experience of a single Technical Analyst, there is no limit to the number or types of resources e.g. Business analysts, Project managers can also be called upon - we suggest that Canada add evaluation criteria for all other categories of personnel to be called up.</p>	<p>The GCDOCS project team holds the required business analysts, project managers and subject matter experts to fulfill the migration team requirements. A technical analyst is required from the Bidder to transfer knowledge of the solution to PWGSC internal technical resources.</p>
39	<p>Ref: Bid Solicitation, General: The RFP evaluates the experience of a single Technical Analyst, there is no requirement to use this analyst or demonstrate equivalent experience in future call ups - what is the purpose of demonstrating the experience of a resource who may or may not be available to Canada at the time of call up? We recommend the removal of all requirements related to the Technical Analyst.</p>	<p>It is not accurate that there is no requirement to use this analyst or demonstrate equivalent experience in future call-ups. As per Section 5.2(c) of the bid solicitation, if the Bidder is unable to provide the services of an individual named in its bid due to the death, sickness, extended leave (including parental leave or disability leave), retirement, resignation or dismissal for cause of that individual, within five business days of Canada's knowledge of the unavailability of the individual the Bidder may propose a substitute to the Contracting Authority, providing:</p>

		<p>(i) the reason for the substitution with substantiating documentation acceptable to the Contracting Authority;</p> <p>(ii) the name, qualifications and experience of a proposed replacement immediately available for work; and</p> <p>(iii) proof that the proposed replacement has the required security clearance granted by Canada, if applicable.</p>
40	Ref: Bid Solicitation, General: Is there an incumbent or have any proofs of concept of a similar nature been conducted? If so, by whom, for how much and when?	No, there is no incumbent and no proof of concepts of a similar nature have been conducted.
41	Ref: Bid Solicitation, Annex A, Statement of Requirements, Mandatory Requirement M-14: Would Canada consider changing the reference requirements in M-14 to: Customers that have used the software solution to either move data "in" and / or "out" of Content Server with at least ONE reference where the data was moved IN to Content Server ?	Please see Solicitation Amendment 6, modification number 3, below.
42	Ref: Bid Solicitation, Annex A, Statement of Requirements, Rated Requirement R-11: Would Canada consider changing reference requirements in R-11 to: Customers that have used the software solution to either move data "in" and / or "out" of Content Server ?	Please see Solicitation Amendment 6 modification number 2, below.
43	Ref: Bid Solicitation, Annex A, Statement of Requirements, Rated Requirement R-12: Please adjust the certification requirement that applies to the bidder to incorporate the possibility of the bidder not being an OpenText partner.	Please see Solicitation Amendment 6, modification number 1, below.

## SECTION B – MODIFICATIONS

- Annex A, Statement of Requirements, Rated Requirement R-12 has been deleted in its entirety and will not be replaced.
- Annex A, Statement of Requirements, Rated Requirement R-11 has been deleted in its entirety and is replaced with the following R-11:

R-11: The Bidder should demonstrate how the proposed solution can be easily adapted to different source document repositories.



3. Annex A, Statement of Requirements, Mandatory Requirement M-14 has been deleted in its entirety and is replaced with the following M-14:

M-14: The bidder must demonstrate that it has the corporate capability to deliver this solution. Corporate capability can be demonstrated through 1,2,3 or 4, below.

1. The implementation for three different external clients. Each implemented software solution must:
  - Have been implemented for an external client with a minimum of 500 users;
  - Have migrated a minimum of 100,000 documents (email, Word, Excel, Powerpoint) to an OpenText Content Server solution;
  - Have been started and completed migration of documents within the three years preceding the posting date of this bid solicitation.

The Bidder must provide customer reference contact information in order to validate the client, number of users, number of documents migrated, and date within the last three years. This must include company/individual name, e-mail address and phone number.
2. The bidder has two in-house resources who have the capability and experience in implementing this type of Solution for 2 different clients. Each implemented Software Solution must:
  - Have been implemented for an external client with a minimum of 500 users;
  - Have migrated a minimum of 100,000 documents (email, Word, Excel, Powerpoint) to an OpenText Content Server solution;
  - Have been started and completed migration of documents within the three years preceding the posting date of this bid solicitation.
3. The bidder, as an organization, has been certified by the Software Publisher.
4. The bidder has two in-house resources who are certified by the Software Publisher.

4. Annex A, Statement of Requirements, Rated Requirement R-1 has been deleted in its entirety and is replaced with the following R-1:

R-1: The Solution should be responsive to the source repository analysis and clean-up requirements by having the functionality to:

1. Identify duplicates and near-duplicates (with only iterative differences in content or formatting) across all repositories; (20 points)
2. Allow the specification of types of documents that should not be migrated, i.e. Temporary or back-up files, documents accessed two years ago, etc. (10 points).

5. Annex A, Statement of Requirements, Rated Requirement R-3 has been deleted in its entirety and is replaced with the following R-3:

R-3: The Solution should have the functionality to optionally migrate all or selected versions of the selected documents from an EDRM source repository into a single document in Content Server.

6. Annex A, Statement of Requirements, Total Maximum Rated Points - Software Solution is hereby revised to 180 points.

7. Annex A, Statement of Requirements, Total Minimum Rated Points Required (60%) - Software Solution is hereby revised to 108 points.

8. Annex A, Statement of Requirements, Total Maximum Rated Points - Bidder and Professional Services Resources is hereby revised to 50 points.

9. Annex A, Statement of Requirements, Total Minimum Rated Points Required (60%) - Bidder and Professional Services Resources is hereby revised to 30 points.

10. Section 4.2 of the Bid Solicitation, entitled "Technical Evaluation", subsection (b)(ii) & (iii) are hereby deleted in their entirety and replaced with the following:

(ii) A **Total Technical Score (TTS)** will be determined in accordance with the specific evaluation criteria set out in Annex A - Statement of Requirements. There are a maximum of **230** points available for rated criteria in the Technical Bid. A Bidder must obtain a minimum evaluated TTS of **138** points (i.e. 60%) or higher out of the overall point-rated maximum points. In all calculations, the TTS will be rounded to two decimal places.

(iii) If a Bidder does not obtain an evaluated TTS of **138** points or higher, it will be considered non-responsive and will be disqualified.

11. Section 4.5 of the Bid Solicitation, entitled "Basis of Selection", subsection (a)(iii) is hereby deleted in its entirety and replaced with the following:

(iii) obtain the required minimum of 138 points overall for the technical evaluation criteria (Rated Requirements) which are subject to point rating. There are a maximum of 230 points available.

12. Annex A, Statement of Requirements, Section 1.9, entitled "Glossary", is hereby amended by adding the following terms:

Migration	Move from one part of something to another
Script	An automated series of instructions carried out in a specific order.

Solicitation No. - N° de l'invitation

EN869-141670/A

Amd. No. - N° de la modif.

006

Buyer ID - Id de l'acheteur

006eem

Client Ref. No. - N° de réf. du client

20141670

File No. - N° du dossier

006eemEN869-141670

CCC No./N° CCC - FMS No/ N° VME

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**ALL OTHER TERMS AND CONDITIONS OF THE BID SOLICITATION  
REMAIN UNCHANGED**