REQUEST FOR INFORMATION (RFI)

ONLINE MAINFRAME HELP SOFTWARE

PURPOSE OF THE REQUEST FOR INFORMATION:

This is not a bid solicitation. This Request for Information (RFI) will not necessarily result in any procurement action. A contract will not result from this activity.

The Canada Revenue Agency (CRA) is seeking feedback from the vendor community on the availability of online mainframe help software. Vendors are requested to provide specific responses to the product questions outlined herein.

The objective of this RFI is to gather the most current information possible from industry on the different solutions available for online mainframe help for IBM CICS mainframe environments.

KEY OBJECTIVES:

The purpose of this RFI is to determine if there are vendors who can provide mainframe help for the CRA's mainframe programs that will meet the CRA's needs. Respondents are requested to address how their product meets each of the following key objectives.

The mainframe help solution must be able to:

- Create, manage, and preview help structure, hierarchy, and topics
- allow entry of text into topics (typing or copy-and-paste)
- let users create hyperlinks in help topics
- identify errors when migrating updates from the development environment to the production environment that could cause access or stability issues (broken links, abends, etc.)
- Provide warning messages when major changes are made, such as completely overwriting an existing help topic or cancelling changes without saving a copy
- manage rules (mapping help topics to screen locations and/or field values)
- accommodate positional help, meaning help specific to a field in a specific location on the screen (online help as opposed to screen help, including the use of "pick lists" to select valid field entries from a list of choices)
- provide pseudo-conversational help within CICS
- provide user access control (for example, writer/reviewer or level 1,2,3)
- provide the ability for help text to be available in both official languages (English and French) where the location of the field on the mainframe screen may be different due to translation

In addition, ideal mainframe help solutions should also be able to:

- import/convert help information from the currently used mainframe help solution "Preference"
- allow customization of help display (examples: provide ability to customize size and location of help screen as well as provide ability for user to expand/collapse help text to provide both preview and full text capabilities)
- allow multiple users to update content/access database at the same time
- support creating and applying templates
- offer built-in spelling and grammar checks in both official languages (Canadian English and Canadian French)
- offer search, find-and-replace features
- offer flexibility of assigning function keys to specific help tasks

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Request for Information (RFI) for an
online mainframe help solution
No. 1000654321

- manage List of Activities
- have Undo features
- offer version control and management
- manage Tables of Content
- offer Export features
- offer reports
- provide bilingual support (English and French) by vendor staff

PRODUCT QUESTIONS:

Please provide detailed responses to the following questions:
1. What online mainframe help products do you offer?
2. For each product, please answer:
   a. How does the product provide/display online mainframe help to end users?
   b. What are the capabilities of this product?
   c. What are the limitations of this product?
   d. How long has your solution been in the marketplace?
   e. Is this product upgradeable (such as firmware updates) to accommodate changes in technology (example: CICS upgrade) in a timely manner?
   f. What are the reporting capabilities of your solution?
   g. What are the auditing, journaling, and data integrity (for example, protection against accidental change) capabilities of your solution?
   h. How does the product manage versions of help information?
3. Describe the user interface for the person updating the help content (rather than the end user viewing the final product).
4. Explain how scalability works for the product. For example, does each mainframe program require different copies of the same product with unique libraries of help topics or does the product use one large library that is shared among many mainframe programs?
5. Are there specific software or versions/levels required? For functional/operational requirement, does the software require CICS or the operating system to be at a particular version/level?
6. How do you license your solution (is it based on number of users, CPU, server, device based, enterprise-wide, etc.)?
7. How often are maintenance and upgrades issued? Are they compatible with existing CICS/operating system versions or do they require version updates?
8. Describe your maintenance and support offerings (for example, pre-deployment, post-deployment, consulting, after-hours support, 7/24 on-call support, etc.).
9. Can all related technical support be provided directly to CRA by the OEM system Vendor (i.e. no outsourcing to third-parties)?
10. Which platforms are supported by the product? Is there ability to convert or upgrade the help screens from CICS to another operating system or platform?

INTERACTIVE PRESENTATION SESSIONS:

CRA may request meetings at their sole discretion with interested respondents who clearly address the key objectives and answer the questions set out above to provide them with the opportunity for a follow-up to written response and to present /discuss their capabilities in relation to this RFI.

If CRA decides to have interactive presentations, respondents will be contacted within 4 to 6 weeks of the RFI closing date to schedule the presentation. An Invite Agenda will be provided to the interested respondents. Specific questions or areas of interest to be covered during the session may also be provided and will be based on responses received.

The on-site presentation session will be located in the National Capital Region. The exact location and timeframe will be detailed in the Invite Agenda. However, at no time will the session exceed 3 hours in length. Vendors will also be asked to provide an electronic version of their presentation material after the presentation session.

The vendor sessions must cover specific details relevant to the key objectives stated within this RFI. As such, representatives attending the session must include Subject Matter Expert(s) in these areas in order to meaningfully respond to questions at the session. CRA senior technical personnel with extensive experience in IT will attend the presentations.

RESPONSES AND ENQUIRIES

Vendors are advised to clearly identify which portion of their response is proprietary. The confidentiality of each Vendor's response will be maintained. Due to the nature of an RFI activity, respondents must be aware that aspects (that have not been labelled confidential) of their responses may be used as a basis for any subsequent Request for Proposal (RFP), if and when the CRA decides to prepare for any future procurement initiative.

Information provided in response to this RFI will be divulged only to individuals authorized to participate in this pre-procurement activity.

Responses to this RFI will not be used to pre-qualify or otherwise restrict participation in any future procurement process (e.g. an RFP). Responses will not be formally evaluated.

CRA will not reimburse any expenditure incurred in preparing responses and participating in the presentation sessions related to this RFI.

The vendor must provide a contact name, email address, and telephone number when submitting their response.

In the event that a response is not sufficiently clear, CRA reserves the right to seek additional information at their sole discretion.

Vendors are requested to submit responses by **Wednesday, August 26th, 2015, 2 p.m.** Eastern Standard Time. The review of responses will begin after the date and time mentioned above. Responses received after that date may not be reviewed.

Vendors are requested to submit responses to this RFI using the following facsimile number, e-mail or delivery address:

Canada Revenue Agency
Bid Receiving Unit Room D-95
Ottawa Technology Center
Receiving Dock
875 Heron Road
Ottawa, Ontario K IA 1A2

Telephone No: (613) 941-1618
Facsimile No: (613) 957-7476
E-mail : Shawn.Woods@cra-arc.gc.ca

Vendors are hereby advised that Bid Receiving Unit of CRA is open from Monday to Friday inclusive, between the hours of 7:00 a.m. and 3:00 p.m., excluding Statutory Holidays.

Only enquiries which clarify the questions asked or feedback requested may be answered with respect to this RFI. All enquiries must be submitted to the attention of the following CRA contact:

Attention: Shawn Woods
Telephone: 613-291-9615
Facsimilie: 613-957-6655
E-mail : Shawn.Woods@cra-arc.gc.ca