



REQUEST FOR INFORMATION (RFI)

KNOWLEDGE AND EVENT MANAGEMENT SOLUTION (KSP)

PURPOSE OF THE REQUEST FOR INFORMATION:

This is not a bid solicitation. This 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 knowledge and event management solutions. Vendors are requested to provide specific responses to the solution offering questions outlined herein. Vendors are requested to provide solution whitepapers if available.

The purpose of this Request for Information (RFI) is to gather the most current information possible from industry on the different knowledge and event management solutions available.

KEY OBJECTIVES:

The objective of this Request for Information (RFI) is to determine if there are vendors who can provide knowledge sharing solutions offerings that will meet the International Relations Office (IRO) mandate. The mandate of the IRO is to leverage advanced technology to allow broader access to existing resources and expertise to national administrations and international/regional organizations.

The intended solution will combine: event calendar management, collaboration, content management, statistical information and user related reporting into a single solution offering that can be leveraged across multiple countries around the world.

The knowledge and event management solution functionality should include the following:

1. Role based access controls
2. Webinar (live and recorded)
3. Business process workflow and automation
4. Registration – self-registration and authentication of new users
5. Document management – capture and management (including versioning) of unstructured data
6. Content and record management – tools to manage system content
7. Communities – clustering and interaction of user groups including collaborative features e.g. Wiki, discussion forum
8. Events – calendaring and organization of events, enrollment, confirmation and reminders



9. External links – capture and description of external hyperlinked data
10. Search – discovery through full text and meta data search with ability to group and filter results
11. Subscription – notification of user-selected changes via RSS or email
12. Surveys – structured and adhoc polling
13. Reporting – usage data
14. Accessibility – Meets or exceeds web content accessibility guidelines (WCAG 2.0)
15. Interoperability –ability for end-users to view the application graphical user interface and use the application on different types of computers, platforms, devices, networks, and applications to work together, without prior communication, to find, retrieve, understand, exchange, and re-use Web content
16. Localization– ability to support interfaces and content in multiple languages
17. Customizable:
 - a. Personalized dashboard
 - b. Extendable thru plugins and/or Application Program Interface API

SOLUTION OFFERING QUESTIONS:

Please provide detailed responses

1. What knowledge and event management solution can you provide?
2. Describe the architecture of the solution.
3. Describe how the solution would be scalable if required to support additional users and volumes.
4. Please elaborate on how you meet all of the 17 requirements identified in the objectives.
5. For each type of knowledge and event management solution, please provide:
 - a. What is the purpose of the solution?
 - b. What are the capabilities of this solution?
 - c. What are the limitations of this solution?
 - d. What are the deployment options for the host solution, and if cloud, specify server locations?
 - e. What are the standard and customizable reporting capabilities of your solution?
 - f. Is this solution upgradeable (such as, software and/or firmware updates) to accommodate changes in technology? Please include a complete technology roadmap with response.
 - g. Has this solution or family of solutions been certified, tested or recommended?
6. What is the availability of your solution? Can it be designed and configured to support a 24/7 environment?
7. How do you license your solution (number of users, CPU, server, device based, enterprise wide, etc.)?
8. How often are maintenance and upgrades issued?



9. Describe the authentication and access control abilities, if any, of your solution.
10. Describe the auditing and journaling capabilities of your solution.
11. What methods does your solution use in support of data integrity?
12. What platform and operating system is compatible with your solution?
13. Describe your maintenance and support offerings (i.e. pre-deployment, post-deployment, consulting, after-hours support, 7/24 on-call support, etc.).
14. Is all related technical support provided directly to CRA by the OEM?
Is third party system Vendors or third party maintenance and support vendors used?

INTERACTIVE PRESENTATION SESSIONS:

CRA may request meetings at their sole discretion with the interested respondents who clearly address 80 percent of 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 via a Webinar presentation.

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 will 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 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 1A 1A2

Telephone No: (613) 941-1618
Facsimile No: (613) 957-7476

E-mail: mary.larkin@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: Mary Larkin
Telephone: 613-995-4643
Facsimilie: 613-957-6655
E-mail : mary.larkin@cra-arc.gc.ca