# Parks Canada

# Cultural Resource Management Information System (CRMIS)

# BID SOLICITATION

# Annex A

# Statement of Work

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# 1 Introduction

## 1.1 Parks Canada Agency Mandate and Role

Parks Canada Mandate: “On behalf of the people of Canada, we protect and present nationally significant examples of Canada’s natural and cultural heritage, and foster public understanding, appreciation and enjoyment in ways that ensure the ecological and commemorative integrity of these places for present and future generations.”

Parks Canada plays a key role through its work to achieve the Government of Canada’s sustainable development and heritage conservation goals. With an annual budget of approximately $600 million and 4,000 full-time employees, Parks Canada protects and presents Canada’s natural and cultural heritage in every region of the country.

Parks Canada’s charter and mandate clearly define the Agency’s role as it pertains to the cultural resources under its jurisdiction (those coming from or contained within Parks Canada heritage areas). Parks Canada’s cultural resources can be found in our National Historic Sites, National Marine Conservation Areas, National Parks and in our historic object and archaeological collections. There are over 700,000 historic objects and reproductions associated with Parks Canada’s heritage areas. Parks Canada is also responsible for over 13,000 archaeological sites and close to 30 million archaeological artifacts across the country.

Cultural resources include both moveable (objects) and *in situ* resources (landscapes, human works or objects in their original locations).

## 1.2 Purpose and Objective

Parks Canada’s cultural resource information is currently housed in many varied and disparate systems. The majority of the existing systems used to manage cultural resource information are located in and administered by Parks Canada offices across the country. There are 9 major systems currently in use that have redundant and often duplicate information and functionality. There are also reference and document repositories as well as systems to manage photo collections and Geographic Information Systems (GIS).

Parks Canada is combining its various and disparate cultural resource information systems into one standardized national system to be accessed by employees across the country. Furthermore, this is an opportunity to create an efficient and effective tool for reporting and decision making.

Parks Canada is looking for a Commercial Off-the-Shelf (COTS) product which is SPECTRUM compliant and specializes in cultural resource management. A major consideration for the success of the Cultural Resource Management Information System (CRMIS) is that it effectively supports program or functional areas in managing cultural resources. In so doing, CRMIS will constitute a single, authoritative information source for cultural resource management including:

- collections management (e.g. archaeological, historic, reproductions, and reference holdings);

- site information management (e.g. archaeological sites, cultural resource locations in national historic sites, national parks, and national marine conservation areas);
- curatorial and historical services (e.g. acquisition, documentation, disposal);
- conservation, conservation sciences and preventative conservation management (e.g. conservation assessment, treatment and preventative conservation of objects);
- digital and non-digital asset management as it pertains to cultural resource management; and,
- management decision making.

CRMIS directly enhances and supports informed decision-making by providing access to integrated, comprehensive and accurate information about Parks Canada's cultural resources thereby supporting Parks Canada's mandate to protect, conserve and present Canada's treasured cultural heritage.

## 1.3 Statement of Work Structure

- The Vendor shall supply Parks Canada with the required and the necessary licenses for a Cultural Resource Management Information System.
- The Vendor shall configure and customize the system as required to ensure it meets all mandatory requirements as described in this Request for Proposal.
- The Vendor shall configure and customize the system as required to ensure it meets all rated and additional requirements for which the Vendor was allocated points as described in this Request for Proposal.
- The Vendor shall provide support, training and appropriate reference materials as defined in this Request for Proposal.
- The Vendor must fill out the associated Response Tables for each of the sections and submit them with their proposal.
- The Vendor shall submit all documentation identified in *2.1.1 Initiation* Phase as part of their proposal.

**The Statement of Work is structured in the following format: Overall System Capabilities and Services**

Section *2 Overall System Capabilities and Services* outlines the following:

a. Scope of Work for the contract and contract term;
b. Activities and Deliverables within the defined initiation phase;
c. Activities and Deliverables within the defined project phase;
d. Requirements;
e. Schedule of Deliverables;
f. Certifications; and,
g. Resulting Contract Clauses.

**Mandatory Requirements**

This section details all the mandatory requirements that the Bidder must provide including:

- General Mandatory Requirements*;*
- Security and Privacy Requirements*;*

- Project Phase Deliverables*; and*
- All documentation identified in *2.1.1 Initiation* Phase

**Rated Requirements**

These sections detail all the requirements upon which the Bidder will be rated. Please note, the Bidder must meet the minimum pass marks for all sections of the rated requirements with the exception of *section 7 Additional Functionality and section 7.2 Additional Features* which have no minimum pass marks. The rated requirements can be found in the following sections:

- Project Understanding and Approach
- General Product Requirements
- General Solution Requirements
- Searching and Reporting
- Technical Requirements
- Application Integration Requirements

**Archaeological Artifact, Historic Object and Reproductions Collections Management**

The CRMIS is intended to be the system of record for information about the Parks Canada Collection which includes archaeological artifacts and historic objects as well as reproductions. Artifacts, historic objects and reproductions are recorded in the system by context (provenience/provenance), descriptive attributes and theme/function.

The system must allow for the addition of supporting information regarding the objects and object collections such as photographs and other documentation. The system must allow for the management of these digital and non-digital assets.

The system will be required to track the movement of the above mentioned objects allowing for the assignment of current, previous and temporary locations to the objects. This must include tracking object movement within the organization as well as external transactions.

The system must allow Parks Canada staff to report on and track the number of artifacts, objects and reproductions as well as their heritage value, condition and location over time.

**Conservation, Conservation Sciences and Preventative Conservation Management**

The CRMIS will be expected to manage Conservation information such as object and site assessments, treatments, treatment histories, recommendations, and preventative measures.

The system must allow for the addition of object and site assessment and treatment information such as photographs and other documentation. The system must allow for the management of digital and non-digital assets.

The system must allow Parks Canada Conservators to track and report on treatments as well as to monitor object and site condition.

**Curatorial and Historical Services Management**

The CRMIS will be expected to manage the main curatorial functions within the system such as the acquisition and disposal of objects as well as grouping objects for purposes such as exhibits. The system must also allow for the management of object life cycles and exhibit (theme) development as well as monitoring and assessing the collection.

**National Historic Site and Archaeological Site Information Management**

Parks Canada's cultural resources are linked to sites, locations, people and events. The various types of sites include but are not limited to:

- National Historic Sites (approximately 170); and
- Archaeological sites (over 13k).

Basic information will be captured about National Historic Sites as it relates to the management of cultural resources, i.e. condition.

The system must capture detailed and extensive information about archaeological sites. Archaeological sites have associated stratigraphic information which includes but is not limited to operations, sub-operations, lots, sub-lots and features. The Parks Canada provenience number (and subsequently the archaeological artifact number) is based on this locational description. More detailed explanation of the Parks Canada provenience system is included in Annex C – Data Dictionary and in the PC Archaeological Recording Manual.

In addition to key site information, the system must support data related to site assessments and archaeological site visits. This information includes observations, actions taken and recommendations for the management of cultural resources and heritage areas.

The system must also allow for the referencing or attachment of supporting information regarding the site visits such as photographs, maps and other digital and non-digital assets for National Historic Sites and archaeological sites.

**Administration**

The system must allow for authorized Parks Canada personnel to manage user accounts and privileges. Administrators must be allowed to manage the controlled vocabularies and options in drop down lists.

**Appendix 1 – Glossary of Terms**
*Appendix 1 – Glossary of Terms* lists key terminology and acronyms used within this Statement of Work as well as the Parks Canada-specific definitions.

**Appendix 2 – Parks Canada Technical Environment**
*Appendix 2 – Parks Canada Technical Environment* describes the various Parks Canada technical environments for servers, network as well as the standard user desktop and tools.

**Annex B – Basis of Payment**
Annex B – Basis of Payment specifies the basis of payment for requirements specified in the Statement of Work.

**Annex C – Data Dictionary**
*Annex C – Data Dictionary* details the information that needs to be captured as well as the data

relationships that need to be established in a Cultural Resource Management Information System. The intention is to guide the Vendor about the information required and not to dictate how this information is presented.

***Response Tables***
Response tables are provided in order to ensure consistency and must be filled out appropriately for each section as indicated in the Statement of Work.

- Response Table 1 – General Mandatory Requirements
- Response Table 2 – Corporate Experience and Named Resources
- Response Table 3 – Rated Requirements
- Response Table 4 – Additional Functionality and Features

**Product Demonstration Evaluation Table**
The Product Demonstration Evaluation Table will be used by Parks Canada to evaluate the product demonstration from the vendors. This table is included for information purposes only.

***Reference Documents***

**PC Archaeological Recording Manual**
*PC Archaeological Recording Manual* is for reference purposes. The manual gives an overview of Parks Canada archaeological procedures and details the Provenience system.

**Parks Canada Brand Guidelines**
*Parks Canada Brand Guidelines* is included for reference purposes.

# 2 Overall System Capabilities and Services

The Vendor must deliver all requirements identified in this section at the dates specified in the Schedule of Deliverables.

a. Scope of Work for the contract and contract term;
b. Activities and Deliverables within the defined initiation and project phases;
c. Mandatory requirements, rated requirements, additional functionality and additional features as identified in the Scope of Work;
d. Certifications; and,
e. Resulting Contract Clauses.

## 2.1 Scope of Work

The Vendor must provide a Cultural Resource Management Information System as detailed by the following:

- Overall System Capabilities and Services
- General Mandatory Requirements
- General Rated Requirements
- Security and Privacy Requirements
- Parks Canada Training Requirements
- Additional Functionality and Features
- Initiation Phase Deliverables
- Project Phase Deliverables
- Implementation and Deployment Plan
- Optional Services
- Schedule of Deliverables

The Bidder must meet all of the Mandatory requirements described in this Statement of Work, including the following sections:

- General Mandatory Requirements*;*
- Security and Privacy Requirements*;*
- Project Phase Deliverables*;*
- All documentation identified in 2.1.1 Initiation Phase*; and*
- Prepare and present a demonstration of the proposed system.

The Bidder is also required to receive a passing mark in each of the rated requirements sections which include:

- General Rated Requirements *including the product demonstration;*
- Security and Privacy Requirements*;*
- Parks Canada Training Requirements

Sections *7.1 Additional Functionality* and *7.2 Additional Features* allow the Bidder to gain additional points. These requirements will be treated as bonus marks.ie. No points will be lost if requirement is not met. A minimum pass mark will not be assigned.

**Project breakdown:**

The project work will be broken down into the following Phases:

- *2.1.1 Initiation* Phase*;*
- *2.1.2 Project Phase;*
  - *2.1.2.1 Improvement Phase;*
  - *2.1.2.2 Testing Phase; and,*
- *2.1.3 Transition Services.*

Parks Canada intends to monitor industry trends and user needs and may extend the proposed system's functionality in order to meet changing business and technology needs and to enhance the system if and when required.

### 2.1.1 Initiation Phase

The Initiation Phase will run from Contract Award until the start of the Project Phase. For the Initiation phase, the Vendor must provide the following documentation for Parks Canada approval. All plans must be clear and concise.

Initiation Phase document drafts must accompany the initial bid. Documentation will be finalized with necessary input from Parks Canada team during the Initiation Phase. The Initiation Phase will be considered complete once all the documents have been approved.

Parks Canada will require 10 working days to review the proposed plans and return comments to the Vendor.

Note: The information or documents required for the Initiation Phase can be combined in one document, they are not required to be separate documents but all plans must be included. The plans do not need to be elaborate but they do need to be clear and concise.

Initiation phase details can be found in section *8 Initiation Phase Deliverables.*

### 2.1.2 Project Phase

The Project Phase will run from the close of the Initiation Phase until the Production Launch of the system (expected to be no later than March 31, 2017), and must include all activities required to prepare the proposed system to meet Parks Canada's Requirements.

Additional information on Specific Requirements relating to the Management of the Project Phase can be found in section *9 Project Phase Deliverables.*

#### *2.1.2.1 Improvement Phase*

The Improvement Phase is considered part of the Project Phase. Parks Canada expects the Vendor to use an iterative approach to pilot and launch the system. This approach will include testing, stabilization and review cycles as part of an Improvement Phase. There will be 2 review periods, a Preliminary Design Review (PDR) and Critical Design Review (CDR).

Improvement Phase details can be found in section *9 Project Phase Deliverables.*

#### *2.1.2.2 Testing Phase*

The Testing Phase is considered part of the Project Phase. Parks Canada expects the Vendor to use a best practices approach to the testing cycle which should include:

- Unit testing;
- Integration testing; and
- Supplying test scripts for Parks Canada testing.

Parks Canada will be responsible for functionality testing, System Acceptance Testing (SAT) and User Acceptance Testing.

Testing phase details can be found in section *9 Project Phase Deliverables*

### 2.1.3 Transition Services after User Final System/Acceptance Testing (S/UAT)

Specific Requirements for the Transition period can be found in *10.4 Transition Services after User Acceptance Testing*.

During the Transition period, the Vendor must, in addition to continuing to perform support phase activities, assist Parks Canada with the smooth, efficient and complete transition to the new system and ensure all reference and training materials have been provided.

# 3 General Mandatory Requirements

- Bidders must meet all of the Mandatory Requirements below.
- Bidders must respond to the corresponding Mandatory Requirements by providing a description and demonstrating their capability or approach to meet the requirement using the using the evaluation criteria contained in *Response Table 1 General Mandatory Requirements* of this Bid Solicitation and *Response Table 2 Corporate Experience and Named Resources*.
- Bidders must use the unique number identified with each Mandatory Requirement and the associated title in responding to the Mandatory Requirements.
- Bidders' responses to the Mandatory Requirements shall be evaluated as "Met" or "Not Met". A "Not Met" shall result in the bid submission being deemed noncompliant.
- In addition to any other obligations contained in the resulting contract, the winning Bidder shall be contractually obliged to provide all services described in any of its responses to these Mandatory Requirements, in accordance with and at the prices contained in Annex B – Basis of Payment.
- Bidders must respond to the Mandatory Requirements using *Response Table 1 General Mandatory Requirements*.

| NUM | Mandatory Requirement |
|---|---|
| **M1** | **Corporate Experience**<br><br>The Bidder must demonstrate its capability to provide the products and services required under this Bid Solicitation by providing corporate reference project profiles as follows:<br><br>a) Two Collections Management Reference Projects where:<br>*i) One of the projects involved archaeological artifacts which were related to archaeological sites;*<br>*ii) One of the projects involved historic objects related to themes, people, events, etc.;*<br>*iii) Interdependent attributes were captured for archaeological artifacts and historic objects;*<br>*iv) The project was delivered by the same Bidding Team member proposed to deliver the cultural resource management information system (as described in the Statement of Work);*<br>*v) The system was in operation for a minimum of 12 consecutive months; and*<br>*vi) The project was completed in the last 5 years or the signed contract has been ongoing for a minimum of 12 months (as of Bid Solicitation issuance date).*<br>b) One Archaeological Site Information Management Reference Project where:<br>*i) The project included an archaeological recording process;*<br>*ii) The system allowed for the capture of site attributes;*<br>*iii) The system aided in the management of on-going activities performed at archaeological sites, and records the actions and impacts;*<br>*iv) The system related artifacts to an archaeological site; and* |

| NUM | Mandatory Requirement |
|---|---|
| | *v) The project was completed in the last 5 years or the signed contract has been ongoing for a minimum of 12 months (as of Bid Solicitation issuance date).*<br>c) One Conservation Management Reference Project Reference where:<br>*i) On-site and object condition assessments were captured;*<br>*ii) Treatment requests were included as part of the system;*<br>*iii) Conservation treatment information was captured; and*<br>*iv) The project was completed in the last 5 years or the signed contract has been ongoing for a minimum of 12 months (as of Bid Solicitation issuance date).* |
| **M2** | **Identification of Bidding Team**<br>The Bidder must:<br>a) Identify its Bidding Team by providing:<br>i) The name of the Prime Contractor and a list of all major sub-contractors, or<br>ii) The names of each member of the Joint Venture including the identification of the lead member of the Joint Venture (if applicable);<br>b) Describe the proposed role and responsibility of each member of the Bidding Team with respect to fulfilling each of the requirement areas described in the Statement of Work; and<br>c) Provide a brief corporate history for each Bidding Team member. |
| **M3** | **Proposed Project Team Resources**<br>The Bidder must propose a qualified resource to fulfill each of the following Project Team roles:<br>*i) Executive Authority*<br>*ii) Project Manager; and*<br>*iii) Solution Technical Lead.*<br>The Bidder must identify by name the individual proposed to fulfill each Project Management Team role and identify the portion of the individuals' time that will be dedicated to the CRMIS Project during the Project Phase as stipulated in the Statement of Work. |
| **M4** | **Core Cultural Resource Management Information Product**<br>The Bidder must identify the Core Cultural Resource Management Information Product (COTS) it proposes to meet the requirements of the proposed system and identify the Bidding Team member who owns the product or provide the name and contact information for the Software Publisher if not a Bidding Team member. |
| **M5** | **Project Documentation** |

| NUM | Mandatory Requirement |
|---|---|
| | The Bidder must provide ~~a~~ draft Project documentation as detailed in section *2.1.1 Initiation* Phase.<br><br>At minimum the Bidder must ensure that key work items, deliverables, and activities (including internal Bidder activities) described in the Statement of Work as well as associated dependencies are included in the documentation.<br><br>The Bidder must ensure that the key milestone dates listed in the Statement of Work are part of the Project Plan. For purposes of preparing the draft project plan for evaluation only, the Bidder must use on or before July 15, 2016 as the date for Milestone A – Project Formal Start. |
| **M6** | **Collections and Curatorial Processes**<br><br>The Bidder must ensure that the proposed system enables Parks Canada personnel to manage the vast Parks Canada Collection including but not limited to object accession and deaccession, object movement tracking, object condition, object attributes and loans. This includes compliance to the following Collections Trust SPECTRUM 4.0 procedures which are:<br><br>• Object Entry<br>• Acquisition<br>• Cataloguing<br>• Location and movement control<br>• Loans in<br>• Loans out<br>• Object exit<br>• Retrospective documentation<br><br>See Annex C - Data Dictionary for field details that Parks Canada currently captures in its disparate systems.<br><br>**Please note:**<br><br>Annex C – Data Dictionary outlines the fields Parks Canada would like to capture based on existing systems' data but should not limit the Vendor's suggestion of alternate and additional fields. |
| **M7** | **Conservation and Conservation Sciences**<br><br>The Bidder must ensure that the proposed system enables Parks Canada Conservation specialists to manage the conservation process. This includes but is not limited to object and site assessments, condition assessments, treatments, treatment histories, tracking objects through the treatment processes, etc. |

| NUM | Mandatory Requirement |
|---|---|
| | This includes compliance to the following Collections Trust SPECTRUM 4.0 procedures which are:<br>• Object Condition checking and technical assessment<br>• Conservation and collections care<br>See Annex C - Data dictionary for field details that Parks Canada currently captures in its disparate systems.<br>**Please note:**<br>Annex C – Data Dictionary outlines the fields Parks Canada would like to capture based on existing systems' data but should not limit the Vendor's suggestion of alternate and additional fields. |
| **M8** | **Archaeological Site Information Management**<br>The Bidder must ensure that the proposed system enables Parks Canada to manage site information including the details of archaeological sites. Site information can include but is not limited to provenience, environmental, stratigraphic and geospatial/cartographic information. The system must enable users to record site visits, recommendations and site condition assessments. Provenience information is based on the Parks Canada provenience system.<br>See Annex C - Data dictionary for field details that Parks Canada currently captures in its disparate systems.<br>**Please note:**<br>Annex C – Data Dictionary outlines the fields Parks Canada would like to capture based on existing systems' data but should not limit the Vendor's suggestion of alternate and additional fields. |
| **M9** | **Scalability**<br>The proposed system must be expandable and scalable to meet Parks Canada's operational, business and technical needs and possible growth. |
| **M10** | **Interface available in both Official Languages**<br>A. The proposed system must be available in both official languages (English and French).<br>B. The proposed system must prompt the user who has not signed into their existing account to select a Language of Preference when entering the system. The language selected must be maintained and all subsequent pages (screens) must be displayed in that selected language. |

| NUM | Mandatory Requirement |
|---|---|
| | C. When a user signs into the proposed system the saved value stored in their Language Preference must be maintained unless manually over-ridden by the user themselves selecting the alternate language.<br><br>D. The System must contain an ever-present toggle on every screen to allow the users the ability to switch their Language of Preference. When the toggle is clicked the present screen must refresh in the newly selected language and going forward all Screen Content, and Error Messaging must appear in the selected language until such time as the user clicks on the toggle to alter the language again or such time as they sign out.<br><br>Upon subsequent sign-in, the Language of Preference selected from the user's account must be observed. |
| **M11** | **Functionality available in both Official Languages**<br><br>The system and all its modules and sections must be fully functional in both official languages (French and English). User entered data does not require translation but all system screens and functionality such as help and tooltips must be in both official languages. |
| **M12** | **Training**<br><br>The Vendor must provide at least 2 train the trainer sessions for Parks Canada bilingual training staff as well as 1 technical training session in English as well as 1 in French for staff who will manage the system, the power users. |
| **M13** | **Training and reference materials**<br><br>The Vendor must supply Parks Canada with all training and reference materials in both official languages. These materials should include but are not limited to quick reference guides, training guides, etc. |
| **M14** | **Environment**<br>The proposed system must function in the Parks Canada technical environment as described in Appendix 2 – Parks Canada Technical Environment. |
| | |

# 4 General Rated Requirements

To be considered responsive, Bidders must achieve a passing mark for each section as indicated in *Response Table 3 - Rated Requirements and Response Table 2 - Corporate Experience and Named Resources*.

Please note that some minimum passing marks have been adjusted to simplify calculations. For example, maximum points of 230 equals a 70% pass mark of 161, this number has been rounded down to 160.

Bidders must respond to the Rated Requirements using *Response Table 3 - Rated Requirements and Response Table 2 - Corporate Experience and Named Resources*. Given the limitations of the response tables (PDF), Bidders may reconstruct them using MS Word or MS Excel. Note that limitations to the number of words per response will still apply. **If a Bidder does not limit their response to the number of words indicated in the sections, the response will be considered a fail**.

## 4.1 Requirement Identification

The rated requirements are uniquely numbered using an R to denote a rated requirement, a number to denote the sub-section followed by a decimal point (.) and a number to uniquely identify the requirement. For example, R1.2 would be the 2nd rated requirement under Overall Corporate Experience.

## 4.2 Rated Section Bidder Instructions

In order to obtain technical point(s), Bidders in preparing their bid submission must respond to the corresponding rated requirement by providing a description explaining, demonstrating, substantiating, or justifying their capability or approach to meet the requirement. Bidders' responses must be relevant and thorough but also clear and concise. Bidders must limit their response for each rated requirement to an absolute maximum of 500 words unless otherwise specified. If a Bidder does not limit his/her response to the maximum number of words, 0 points will be given to that particular rated requirement. Bidders are required to use the unique number identified with each rated requirement and the associated title in responding to the rated requirements.

Bidders' responses to the rated requirements will be evaluated and scored in accordance with the Response Tables. Only bids that obtain the minimum pass mark and other conditions indicated will be considered responsive and move to the next step in the evaluation process (product demonstration).

## 4.3 Rated Requirements

A selection of the Rated Requirements will be evaluated using the following General Guide. The selected requirements will have "General Guide" indicated in the 'Evaluation Grid for Bidder's Response' column.

The evaluator will rate the merits (strengths and weaknesses) of the Bidder's response based on the degree to which the evaluator considers the response sufficiently addresses topics or issues that are applicable to the evaluation criteria in a manner that:

- is clear, pertinent and unambiguous; and
- fully supports or demonstrates that the objective specified in the evaluation criteria is achieved.

### 4.3.1 Corporate Experience

The Bidder's Corporate Experience will be evaluated out of a maximum of 280 points with a pass mark of 140 (50%).

#### *4.3.1.1 Overall Corporate Experience*

The Bidder's Overall Corporate Experience will be assessed using the evaluation criteria contained in Corporate Experience Response Tables of this Bid Solicitation as follows:

Bidder must respond using *Response Table 2 - Corporate Experience and Named Resources*.

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R1.1** | **Bidder's demonstrated experience with Historic Object Collections Management solutions.**<br><br>The Bidder must detail their experience with Collections Management centric solutions. The Bidder must identify and describe reference projects to substantiate this experience. (Max 500 words) | a) 5 or more years – 50 Points<br>b) 3 years and less than 5 years – 35 Points<br>c) 1 year and less than 3 years – 20 Points<br>d) Less than 1 year – 0 Points |
| **R1.2** | **Bidder's demonstrated experience with Archaeological Artifact Collections Management solutions.**<br><br>The Bidder must detail their experience with Archaeological Collections Management centric solutions. The Bidder must identify and describe reference projects to substantiate this experience. (Max 500 words) | a) 5 or more years – 50 Points<br>b) 3 years and less than 5 years – 35 Points<br>c) 1 year and less than 3 years – 20 Points<br>d) Less than 1 year – 0 Points |
| **R1.3** | **Bidder's demonstrated experience with Conservation Management solutions.**<br><br>The Bidder must detail their experience with Conservation Management centric solutions. The Bidder must identify and describe reference projects to substantiate this experience. (Max 500 words) | a) 5 or more years – 50 Points<br>b) 3 years and less than 5 years – 35 Points<br>c) 1 year and less than 3 years – 20 Points<br>d) Less than 1 year – 0 Points |
| **R1.4** | **Bidder's demonstrated experience with Archaeological Site Information Management solutions.**<br><br>The Bidder must detail their experience with Archaeological Site Information Management centric solutions. The Bidder must identify and describe reference projects to substantiate this experience. (Max 500 words) | a) 5 or more years – 50 Points<br>b) 3 years and less than 5 years – 35 Points<br>c) 1 year and less than 3 years – 20 Points<br>d) Less than 1 year – 0 Points |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R1.5** | **Bidder's demonstrated experience with Curatorial Management solutions.**<br><br>The Bidder must detail their experience with Curatorial Management centric solutions. The Bidder must identify and describe reference projects to substantiate this experience. (Max 500 words) | a) 5 or more years – 50 Points<br>b) 3 years and less than 5 years – 35 Points<br>c) 1 year and less than 3 years – 20 Points<br>d) Less than 1 year – 0 Points |
| **R1.6** | **Training Experience**<br><br>The Bidder must provide a detailed explanation of the Bidder's current training offering and experience with providing end-user training.<br><br>The explanation should include the following information:<br>a) A description of Current Training Material;<br>b) A description of Online Training offering including testing;<br>c) A copy of a Current Training package's Table of Contents;<br>d) A sample of a section of training material related to setting up a new user on the proposed system. | General Guide<br><br>Based upon:<br>i) Degree to which the response provides a comprehensive and logical description of the Bidder's current training offering and experience<br>ii) Degree to which the sample training material provides a comprehensive and logical example of training material. |
| | | |

### *4.3.1.2 Project Understanding and Approach*

The rated requirements associated with Project Understanding and Approach will be evaluated out of a maximum of 970 points and have a minimum pass mark of 475. For requirements in Section 4.3.2, limit responses to 500 words each unless otherwise stated.

Bidder must respond using *Response Table 3 – Rated Requirements*.

The requirements are as follows:

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R2.1** | **Project Understanding**<br><br>The Bidder must provide a summary of its understanding of this project. The | General Guide<br><br>Based upon: |

| | | |
|---|---|---|
| | summary should include a brief overview of the key Parks Canada business requirements.(Max 1000 words)<br><br>The Bidder should, at a minimum:<br><br>a) Describe its understanding of the scope of the project, its objectives and Parks Canada key requirements. The Bidder must not simply reiterate information contained in the Statement of Work but should document its own understanding of these requirements.<br><br>b) Provide information on the following items:<br><br>i. The Test Strategy for the proposed system that addresses the requirements identified within *9 Project Phase Deliverables.* | Degree to which the response provides a comprehensive and logical description of the project's scope, objectives and requirements and addresses the items identified. |
| **R2.2** | **Contractor Governance Model**<br><br>The Bidder must detail how it proposes to organize itself to manage and deliver the proposed system, including:<br><br>a) A description of the Contractor Governance Model the Bidder proposes to use to integrate and manage the Work to be delivered under the Contract, including the Work performed by its sub-Contractors. The proposed model should address the escalation and resolution of issues and disputes. In addition, the proposed model should clearly identify the role and relationships of the proposed Project Team resources.<br><br>b) A description of the approach the Bidder proposes to utilize to manage and report monthly progress against the Project | Responses will be evaluated and scored out of a maximum of 70 points based on:<br><br>a) Thoroughness of the description of the Contractor Governance Model the Bidder proposes to use to integrate and manage the Work to be delivered under the Contract, including the Work performed by its sub-Contractors. – Up to 50 points;<br><br>b) Thoroughness of the description of approach the Bidder proposes to use to manage and report monthly progress against the Work Plan and firm fixed-costs for the Project Definition Phase proposed in response to this Bid Solicitation - Up to 20 points. |

| | | |
|---|---|---|
| | Plan and firm fixed-costs for the Project Phase proposed in response to this Bid Solicitation. | |
| **R2.3** | **Evaluation of Project Plan**<br><br>The Bidder must provide a draft project plan for the Project Phase as described in section *9 Project Phase Deliverables* (Max 1500 words).<br><br>At a minimum the Bidder must ensure that key work items, deliverables, and activities (including internal Bidder activities) described in section *9 Project Phase Deliverables* as well as associated dependencies are included in the plan.<br><br>The Bidder must ensure that the key milestone dates listed in section *9 Project Phase Deliverables* are part of the Project Plan. For purposes of preparing the draft project plan for evaluation only, the Bidder must utilize on or before July 15, 2016 as the date for Project Formal Start. | General Guide<br><br>Based upon:<br>Degree to which the response meets the objective of:<br>i) providing a logical and comprehensive work break down structure to reflect all key work items, deliverables and other activities;<br>ii) specifying logical dependencies among those work items, deliverables and other activities; and,<br>iii) demonstrating that the Bidder has fully considered all activities necessary to complete the work. |
| **R2.4** | **Solution and Technical Architectures**<br><br>The Bidder must provide draft Solution and Technical Architectures for their proposed system that address the requirements identified within section *9 Project Phase Deliverables.* | General Guide<br><br>Based upon:<br>Degree to which the response provides comprehensive and logical description of Solution and Technical Architectures that address key requirements. |
| | | |

### *4.3.1.3 Named Resources*

Bidder must respond using *Response Table 2 - Corporate Experience and Named Resources*.

| NUM | Named Resources Point Rated Criteria | Maximum Points | Passing Mark |
|---|---|---|---|
| R2.5 | Executive Authority<br><br>Years of experience dealing with government type of institutions | 60 | 25 |

| | | | |
|---|---|---|---|
| | a) 5 or more years – 10 Points<br>b) 3 to 4 years – 7 Points<br>c) 1 to 2 years – 5 Points<br>d) Less than 1 year – 0 Points | | |
| R2.6 | Project Manager<br>Years of experience with these types of solutions<br>a) 5 or more years – 10 Points<br>b) 3 to 4 years – 7 Points<br>c) 1 to 2 years – 5 Points<br>d) Less than 1 year – 0 Points | 70 | 49 |
| R2.7 | Solution Technical Lead<br>Years of experience with the proposed system<br>a) 5 or more years – 10 Points<br>b) 3 to 4 years – 7 Points<br>c) 1 to 2 years – 5 Points<br>d) Less than 1 year – 0 Points | 100 | 70 |
| | | | |
| | **Maximum Points Available:** | **230** | **144** |

### 4.3.2 Features

Bidder must respond using *Response Table 3 – Rated Requirements*.

#### *R 4.3.2.1 Features*

| | Max. Points | Passing Mark |
|---|---|---|
| *4.3.1.2 Project Understanding and* Approach | 970 | 475 |
| *4.7 General Product Information* Requirements | 345 | 165 |
| *4.8 General Solution* Requirements | 1270 | 720 |
| *4.9 Searching and Reporting* Requirements | 2126 | 1364 |
| *4.10 Technical* Requirements | 4880 | 2520 |
| *4.11 Application integration* requirements | 200 | 128 |

| | | |
|---|---|---|
| **Total** | 9791 | 5372 |

## 4.4 Additional Functionality

Section *7* *Additional Functionality* will be evaluated out of a maximum of 560 points.

**Note:** If the Bidder is awarded points for any of the Additional Functionality during the Bid Evaluation, upon Contract award the Contracting Authority will amend the Contractual Obligations of Contractor's Bid Response section to reflect that this functionality will now form part of the Contract and the Contractor will be required to provide this functionality in accordance with and at the prices contained in Annex B – Basis of Payment.

Bidders should respond by completing Response Table 4 - Additional Functionality and Features.

| Additional Functionality | Max. Points |
|---|---|
| 7 Additional Functionality | 560 |

## 4.5 Additional Features

Section *7.2* *Additional Features* will be evaluated out of a maximum of 500 points. Additional Features are features built into the application that Parks Canada has not requested but would enhance the functionality of the system for the client. Points will not be awarded if the feature is required to fulfill one of the existing mandatory requirements, rated requirements or additional functionality. The Vendor will not receive points if the feature is deemed to be of no added value by Parks Canada evaluators.

**Note:** If the Bidder is awarded points for any of the Additional Features during the Bid Evaluation, upon Contract award the Contracting Authority will amend the Contractual Obligations of Contractor's Bid Response section to reflect that these features will now form part of the Contract and the Contractor will be required to provide these features in accordance with and at the prices contained in Annex B – Basis of Payment.

Bidders should respond to section *7.2* *Additional Features* by completing Response Table 4 - Additional Functionality and Features.

| Additional Functionality | Max. Points |
|---|---|
| 7 Additional FunctionalityFeatures | 500 |

## 4.6 Contractual Obligations

In addition to any other obligations contained in the resulting contract, the successful Bidder will be contractually obliged to provide each of the Additional Functionalities for which it will be awarded technical points in *Response Table 4 - Additional Functionality* in accordance with and at the prices contained in *Annex B – Basis of Payment*. The Government of Canada will incorporate these Additional Functionalities into Contractual Obligations of Contractor's Bid Response.

## 4.7 General Product Information Requirements

Bidder must respond using *Response Table 3 – Rated Requirements*.

The requirements are as follows:

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R3.1** | **Product Information**<br><br>The Bidder must submit information regarding the Core Product which they intend to use in the proposed system.<br><br>The Bidder must provide the following information:<br><br>a) Current and past names of the product;<br>b) Year product was first introduced to the market;<br>c) Total number of employees (within the company that owns the Core Product) focused on the proposed core product by Development Team; and by Post-production Support;<br>d) Product History including prior product releases, dates of releases and details of enhancements for the last 3 years;<br>e) Total number of current customers using the product;<br>f) Total number of past customers that used the product; and<br>g) Short description of the Core Functions of the Product. | General Guide<br><br>Based upon:<br>Degree to which the response provides a comprehensive and logical description of the Core Product and how it aligns with the requirements for the proposed system. |
| **R3.2** | **SPECTRUM Compliance**<br><br>The Bidder must detail how the proposed solution is compliant to the following SPECTRUM 4.0 processes:<br><br>• Pre-entry (Curatorial/archaeological)<br>• Deaccession and disposal<br>• Inventory control<br>• Insurance and indemnity | The Bidder must provide substantive evidence that the proposed system is compliant with the listed SPECTRUM processes. Bidder will be awarded 20 points for each compliant process. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | • Valuation control<br>• Audit<br>• Rights management<br>• Use of collections<br>• Transport<br>• Risk management<br>• Loss and damages | |
| **R3.3** | **Reporting Services Offering**<br><br>The Bidder must describe their current Reporting Services offering. The description should include canned reports and ad-hoc reporting functionality. The description should indicate how their current offering meets the requirements as described in *4.9.2 Reporting Requirements.* | General Guide<br><br>Based upon:<br><br>i) Degree to which the response provides a comprehensive and logical description of the Bidder's reporting Services offering.<br><br>ii) Degree to which the current offering meets the requirements described in *4.9.2 Reporting Requirements.* |
| **R3.4** | **Reports**<br><br>The Bidder must list and describe the reports offered with their current Reporting Services offering. | Complete list of included reports – 25 points<br><br>No reports included – 0 points |
| | | |

## 4.8 General Solution Requirements

Bidder must respond using *Response Table 3 – Rated Requirements*.

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R4.1** | **User Permissions – Role-based assignment**<br><br>The proposed system should allow the ability to assign specific permission to individuals based on functional roles. | The Bidder must provide substantive evidence that the proposed system provides the ability to assign specific permission to individuals based on functional roles. |
| **R4.2** | **User Permissions – Task-based assignment**<br><br>The proposed system should allow administrators to assign a specific task access to individuals instead of the range of accesses associated with a particular role. | The Bidder must provide substantive evidence that the proposed system enables a user to assign a specific task access to individuals instead of the range of accesses associated with a particular role. |
| **R4.3** | **Discipline/Function based interface**<br><br>The proposed system must have built-in modules or functions specific to discipline (e.g. separate module for collections, archaeology, conservation, curatorial, digital asset management). | The Bidder must provide substantive evidence that the proposed system has built-in modules or functions specific to disciplines:<br><br>a) The proposed system has a built-in module for Collections management<br>b) The proposed system has a built-in module for Archaeological site management<br>c) The proposed system has a built-in module for Conservation management<br>d) The proposed system has a built-in module for Curatorial process management<br>e) The proposed system has a built-in module for Digital Asset management |
| **R4.4** | **Digital assets related to objects**<br><br>The proposed system must provide the ability to link or attach digital assets to objects/artifacts/reproductions. | The Bidder must provide substantive evidence that the proposed system provides the ability to link or attach digital assets to objects/artifacts/reproductions. |
| **R4.5** | **Digital assets related to Collections**<br><br>The proposed system must provide the ability to link or attach digital assets to Collections information. | The Bidder must provide substantive evidence that the proposed system provides the ability to link or attach digital assets to Collections information. |
| **R4.6** | **Digital assets related to Conservation** | The Bidder must provide substantive evidence that the proposed system provides |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | The proposed system must provide the ability to link or attach digital assets to Conservation information. | the ability to link or attach digital assets to Conservation information |
| **R4.7** | **Digital assets related to archaeological sites**<br><br>The proposed system must provide the ability to link or attach digital assets to archaeological site information. | The Bidder must provide substantive evidence that the proposed system provides the ability to link or attach digital assets to archaeological site information. |
| **R4.8** | **Non-digital assets related to objects**<br><br>The proposed system must provide the ability to reference non-digital assets to objects/artifacts/reproductions. | The Bidder must provide substantive evidence that the proposed system provides the ability to reference non-digital assets to objects/ artifacts/ reproductions. |
| **R4.9** | **Non-digital assets related to Collections**<br><br>The proposed must system provide the ability to reference non-digital assets to Collections information. | The Bidder must provide substantive evidence that the proposed system provides the ability to reference non-digital assets to Collections information. |
| **R4.10** | **Non-digital assets related to Conservation**<br><br>The proposed system must provide the ability to reference non-digital assets to Conservation information. | The Bidder must provide substantive evidence that the proposed system provides the ability to reference non-digital assets to Conservation information. |
| **R4.11** | **Non-digital assets related to archaeological sites**<br><br>The proposed system must provide the ability to reference non-digital assets to archaeological site information. | The Bidder must provide substantive evidence that the proposed system provides the ability to reference non-digital assets to archaeological site information. |
| **R4.12** | **Record duplication**<br>The proposed system must allow record duplication to be performed on demand at the record level in order to facilitate entry of multiple similar items. | The Bidder must provide substantive evidence that the proposed system allows data duplication to be performed automatically at the record level. |
| **R4.13** | **Default Values**<br>The proposed system must allow any data field to be assigned a start-up default value | The Bidder must provide substantive evidence that the proposed system allows any data field to be assigned a start-up |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | that will be automatically entered for new entries (e.g. date). | default value that will be automatically entered for new entries (e.g. date). |
| **R4.14** | **Mandatory fields**<br>The proposed system must allow any number of fields to be flagged as mandatory. | The Bidder must provide substantive evidence that the proposed system allows any number of fields to be flagged as mandatory. |
| **R4.15** | **Calculated fields**<br>The proposed system must allow field entries to be calculated from other field entries or constants. This includes entry field dependencies bases on previous selections (if a user selects a national historic site, then only the buildings on that site will be available in the location drop down; if a user selects a Field Unit, then only the parks and sites within that Field Unit will be displayed in the drop down). | The Bidder must provide substantive evidence that the proposed system allows field entries to be calculated from other field entries or constants |
| **R4.16** | **Cut, Copy and paste**<br>The proposed system must allow cut, copy and paste operations (e.g. cut a field and paste it to another field). | The Bidder must provide substantive evidence that the proposed system allows cut, copy and paste operations |
| **R4.17** | **Field copying**<br>The proposed system must allow copying of fields selectively from one record to another. | The Bidder must provide substantive evidence that the proposed system allows copying of fields selectively from one record to another. |
| **R4.18** | **Search and replace within record**<br>The proposed system must offer a search and replace function within a single record during the data entry (e.g. identify a source name, search for the name within one record only, and replace with new text). | The Bidder must provide substantive evidence that the proposed system offers a search and replace function within a single record during the data entry. |
| **R4.19** | **Search and replace between records**<br>The proposed system must offer a search and replace function between records during the data entry (e.g. identify a source name, search for the name across the database, and replace with new text). | The Bidder must provide substantive evidence that the proposed system offers a search and replace function between records during the data entry. |
| **R4.20** | **Field level controls**<br>The proposed system must allow Parks Canada to set controls over mandatory/optional settings for each field to | The Bidder must provide substantive evidence that the proposed system allows Parks Canada to set controls over mandatory/optional settings for each field to |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | set the default value of a field and to apply input masks. | set the default value of a field and to apply input masks. |
| **R4.21** | **Spell checker**<br>The proposed system must include a spell checker. | The Bidder must provide substantive evidence that the proposed system includes a spell checker. |
| **R4.22** | **Language of spell checker**<br>The proposed system must include a spell checker that support Canadian English and Canadian French. | The Bidder must provide substantive evidence that the proposed system includes a spell checker in both English and French. |
| **R4.23** | **Date format**<br>The proposed system must support date formats required by Parks Canada. This should include dates before present, before common era (BP, BCE, BC, and AD) including both calendar and absolute dates. See Annex C – Data Dictionary for detailed descriptions. | The Bidder must provide substantive evidence that the proposed system supports date formats required by Parks Canada. |
| **R4.24** | **Radiocarbon Dates**<br>The proposed system must support radiocarbon dates, both conventional and calibrated. | The Bidder must provide substantive evidence that the proposed system supports radiocarbon dates, both conventional and calibrated. |
| **R4.25** | **Approximate dates**<br>The proposed system must support approximate dates (e.g. prior to, later than, circa, BC, AD). See Annex C – Data Dictionary for detailed descriptions. | The Bidder must provide substantive evidence that the proposed system supports approximate dates. |
| **R4.26** | **Other Languages – UTF-8**<br><br>The proposed system must support the Unicode UTF-8 character-set standard. This is required for some aboriginal languages. | The Bidder must provide substantive evidence that the proposed system supports the Unicode UTF-8 character-set standard. This is required for some aboriginal languages. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R4.27** | **System allows for data pre-population**<br><br>The proposed system must have the ability to pre-populate various forms with available information (e.g. Request for Conservation Services has basic object record information; pre-populate Author Name based on User Name, Creation Date based on current system date, etc.). | The Bidder must provide substantive evidence that the proposed system has the ability to pre-populate various forms with available information |
| **R4.28** | **Concurrency control**<br><br>The proposed system must allow only a single user to modify specific content at any one time in order to prevent system or operational conflict. | The Bidder must provide substantive evidence that the proposed system allows only a single user to modify specific content at any one time in order to prevent system or operational conflict. |
| **R4.29** | **Ability to print labels**<br><br>The proposed system must allow the user to print a variety of labels with object attributes such as object numbers, descriptions, bar codes, locations, etc.<br><br>See *4.9 Searching and Reporting Requirements.* | The Bidder must provide substantive evidence that the proposed system allows the user to print a variety of labels with object attributes such as object numbers, descriptions, bar codes, locations, etc. |
| **R4.30** | **Printer-friendly**<br><br>The proposed system must provide a standard capability for users to render a "printer-friendly" version of every page. | The Bidder must provide substantive evidence that the proposed system provides a standard capability for users to render a "printer-friendly" version of every page. |
| **R4.31** | **Enforceable workflows**<br><br>The proposed system must provide functionality or well-defined processes to include automated workflow and publishing. | The Bidder must provide substantive evidence that the proposed system provides functionality or well-defined processes to include automated workflow and publishing. |
| **R4.32** | **Workflow Management**<br><br>Workflows are dynamic and at times change with varying organizational needs. Workflows within the proposed system must be able to be changed or modified to reflect these business needs. | The Bidder must provide substantive evidence that the proposed system provides workflows that can be changed or modified to reflect Parks Canada business needs. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R4.33** | **Approver Substitution**<br><br>The proposed system must allow role/individual substitution or override in approval workflow processes. | The Bidder must provide substantive evidence that the proposed system allows role/individual substitution or override in approval workflow processes. |
| **R4.34** | **Provide training Plan**<br><br>The Bidder must propose a training plan which includes train the trainer and training of power users who will manage the system (controlled vocabularies, users, etc.) | The training plan will be evaluated on completeness and clarity. See *6 Parks Canada Training Requirements*. |

## 4.9 Searching and Reporting Requirements

Bidder must respond using *Response Table 3 – Rated Requirements*.

### 4.9.1 Searching Requirements

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R5.1** | **Boolean search**<br><br>The proposed system must allow users to combine keywords with operators such as AND, NOT and OR to produce more relevant results. | The Bidder must provide substantive evidence that the proposed system allows users to combine keywords with operators such as AND, NOT and OR to produce more relevant results. |
| **R5.2** | **Search accommodates multilingual characters**<br><br>The proposed system must allow users to search on multilingual characters. | The Bidder must provide substantive evidence that the proposed system allows users to search on multilingual characters. |
| **R5.3** | **Query any field**<br><br>The proposed system must allow users to run queries against any of the fields, including but not limited to:<br><br>a) Objects by location<br>b) Objects by attribute (colour, class, material, theme)<br>c) Condition of objects by location<br>d) Site by condition<br>e) Photos by site<br>f) Digital assets by site | The Bidder must provide substantive evidence that the proposed system allows users to run queries against any of the fields. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | g) Objects/sites by heritage value<br>h) Conservation treatments by date<br>i) Activity by investigator | |
| **R5.4** | **Sort results**<br>Users must be able to sort query results by various fields (e.g. perform a query and display the results and sort by user preference). | The Bidder must provide substantive evidence that the proposed system allows users to sort query results by various fields. |
| **R5.5** | **Multiple field sorting**<br>The proposed system must allow users to sort search results by multiple fields. | The Bidder must provide substantive evidence that the proposed system allows users to sort search results by multiple fields. |
| **R5.6** | **Saving search results**<br>The proposed system must allow a modified sort table to be saved for future use. | The Bidder must provide substantive evidence that the proposed system allows a modified sort table to be saved for future use. |
| **R5.7** | **Ability to search on groupings**<br>The proposed system must allow users to search on groups. | The Bidder must provide substantive evidence that the proposed system allows users to search on groups. |
| **R5.8** | **Search not dependent on character case**<br>The proposed system must allow users to search regardless of upper or lowercase characters. | The Bidder must provide substantive evidence that the proposed system allows users to search regardless of upper or lowercase characters. |
| **R5.9** | **Multiple attributes**<br>The proposed system must allow users to search results by multiple attributes.<br>E.g. Recommendations for archaeological site mitigation measures by location or number of objects by name, condition and location. | The Bidder must provide substantive evidence that the proposed system allows users to search results by multiple attributes. |
| **R5.10** | **Filter search results**<br>The proposed system must allow users to filter their search results in order to refine those results. | The Bidder must provide substantive evidence that the proposed system allows users to filter their search results in order to refine those results. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | | |

### 4.9.2 Reporting Requirements

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R6.1** | **Integration of Data Sources for Reporting**<br><br>The proposed system's Reporting Service must include single window access and the ability to pull from multiple data sources, as defined in the list below, into a single report:<br><br>a) Collections data;<br>b) Site and Archaeological Site data;<br>c) Conservation and Conservation Sciences data;<br>d) Curatorial and History data;<br>e) System Usage data. | The Bidder must provide substantive evidence that the proposed system includes single window access and the ability to pull from multiple data sources. |
| **R6.2** | **Reporting Architecture**<br><br>The Vendor must provide a diagram of the proposed system's reporting architecture and include descriptions of each component and its interactions with other components.<br><br>The Reporting Architecture must be provided at Pilot/UA Testing Start and must be updated whenever the system is updated. | The Bidder must provide substantive evidence that the Vendor will provide a diagram of the proposed system's reporting architecture. |
| **R6.3** | **Report Templates**<br><br>The proposed system's Reporting Service must include functionality that allows users to create new reports, modify existing reports and save these reports as templates. | The Bidder must provide substantive evidence that the proposed system |
| **R6.4** | **Report Scheduling**<br><br>The proposed system's Reporting Service must include functionality that allows Parks Canada users to specify the schedule to generate reports from the service. | The Bidder must provide substantive evidence that the proposed system's Reporting Service includes functionality that allows users to create new reports, modify existing reports and save these reports as templates. |
| **R6.5** | **Report Template Publishing and Sharing**<br><br>The proposed system's Reporting Service must include functionality that allows Parks | The Bidder must provide substantive evidence that the proposed system's Reporting Service includes functionality that |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | Canada users to create, publish and share new report templates. | allows Parks Canada users to create, publish and share new report templates. |
| **R6.6** | **Ad-hoc Reporting**<br><br>The proposed system's Reporting Service must include ad-hoc reporting functionality for authorized Parks Canada users. | The Bidder must provide substantive evidence that the proposed system's Reporting Service includes ad-hoc reporting functionality for authorized Parks Canada users. |
| **R6.7** | **Ad-hoc Reporting Interface**<br><br>The ad-hoc reporting functionality must allow users to create specific, customized queries via a user-friendly GUI-based system without requiring in-depth programming knowledge. | The Bidder must provide substantive evidence that the proposed system ad-hoc reporting functionality allows users to create specific, customized queries via a user-friendly GUI-based system without requiring in-depth programming knowledge. |
| **R6.8** | **Distribute and Export Reports**<br><br>The proposed system's Reporting Service must include functionality for Parks Canada users to electronically distribute and export reports. At minimum, the report formats to be delivered must include:<br><br>A. MS Word;<br>B. Excel;<br>C. CSV;<br>D. XML; and<br>E. PDF. | The Bidder must provide substantive evidence that the proposed system's Reporting Service includes functionality for Parks Canada users to electronically distribute and export reports |
| **R6.9** | **Role-Based Reporting Access**<br><br>The proposed system's Reporting Service must include role-based access to reporting at the global, park, site, and additional granular levels that at minimum match the access controls of the system. | The Bidder must provide substantive evidence that the proposed system's Reporting Service includes role-based access to reporting at the global, park, site, and additional granular levels that at minimum match the access controls of the system. |
| **R6.10** | **Task-Based Reporting Access**<br><br>The proposed system's Reporting Service must include task-based access to reporting at the global, park, site, and additional granular levels that at minimum match the access controls of the system. | The Bidder must provide substantive evidence that the proposed system's Reporting Service includes task-based access to reporting at the global, park, site, and additional granular levels that at minimum match the access controls of the system. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R6.11** | **Printable Reports**<br><br>The proposed system's Reporting Service must include the functionality to print all reports on various sizes of paper and labels as required. | The Bidder must provide substantive evidence that the proposed system's Reporting Service includes the functionality to print all reports on various sizes of paper and labels as required. |
| **R6.12** | **Printable Blank Reports and Forms**<br><br>The proposed system's Reporting Service must include the functionality to print all reports and forms with no data so they can be populated in the field. | The Bidder must provide substantive evidence that the proposed system's Reporting Service includes the functionality to print all reports and forms with no data so they can be populated in the field. |
| | | |

## 4.10 Technical Requirements

For information on the technical environment at Parks Canada see *Appendix 2 – Parks Canada Technical Environment*.

It is the Vendor's responsibility to deliver and support all software and technology components required for the proposed system to work as defined in the Statement of Work.

Bidder must respond using *Response Table 3 – Rated Requirements*.

### 4.10.1 General

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R7.1** | **Database**<br><br>The proposed system should use one of the following databases:<br>• Oracle 11g<br>• Microsoft SQL Server 2008R2/2012<br>• proprietary self-contained database | The Bidder must provide substantive evidence that the proposed system will use one of the databases described. |
| **R7.2** | **Database Query Tools**<br><br>The proposed system database should be compatible with the Parks Canada standard Database query tools which are SQL Developer and SQL Server Management Studio. | The Bidder must provide substantive evidence that the proposed system will be compatible with the Parks Canada standard Database query tools which are SQL Developer and SQL Server Management Studio. |
| **R7.3** | **Application Server**<br><br>The proposed system should be compatible with the Parks Canada standard Application server which is Microsoft Internet Information Server (IIS) or at least use a Windows compatible application server. | The Bidder must provide substantive evidence that the proposed system will be compatible with the Parks Canada standard Application server which is Microsoft Internet Information Server (IIS) or at least use a Windows compatible application server. |
| **R7.4** | **Scripting Interface**<br><br>The Vendor should supply an API or some other type of Scripting environment | The Bidder must provide substantive evidence that the Vendor will supply an API or some other type of Scripting environment |
| **R7.5** | **Programming Language**<br><br>Developers should be able to use C#, VB.Net or C++ to write to/from the API or Scripting environment. | The Bidder must provide substantive evidence that developers will be able to use C#, VB.Net or C++ to write to/from the API or Scripting environment. |
| **R7.6** | **Graphical User Interface**<br><br>The proposed system should take full advantage of the Windows Operating System, high resolution monitors and dual monitors. Application windows | The Bidder must provide substantive evidence that the proposed system will take full advantage of the Windows Operating System, high resolution monitors and dual monitors. Application windows will be fully |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | should be expandable, application should work in full screen mode and navigation should be consistent. | expandable, the application will work in full screen mode and navigation will be consistent. |
| **R7.7** | **Web Interface**<br><br>All system Web interfaces should be fully functional using the Parks Canada standard Web browser which is Microsoft Internet Explorer 9. | The Bidder must provide substantive evidence that the proposed system will be fully functional using the Parks Canada standard Web browser which is Microsoft Internet Explorer 9. |
| **R7.8** | **User desktop**<br>The proposed system should function using standard Parks Canada desktop/laptop builds.<br><br>See *A2.2 End user computing devices.* | The Bidder must provide substantive evidence that the proposed system will function using standard Parks Canada desktop/laptop builds. |
| **R7.9** | **Support Multiple Time Zones**<br>Parks Canada operates in all 6 time zones across Canada representing a 5 1/2 hour time difference throughout the day. The proposed system should accommodate these time differences. | The Bidder must provide substantive evidence that the proposed system will be able to accommodate the time zones Parks Canada operates in. |
| **R7.10** | **Daylight Savings Time**<br><br>The proposed system should automatically adjust for daylight savings time and standard time. | The Bidder must provide substantive evidence that the proposed system will automatically adjust for daylight savings time and standard time. |
| **R7.11** | **Users**<br><br>The proposed system should support a minimum of 60 users with varying roles. The largest number would be consumers of the information, these would be considered secondary users as opposed to the primary users who would work with the proposed system as part of their role. | The Bidder must provide substantive evidence that the proposed system will support a minimum of 60 users with varying roles. |
| **R7.12** | **Concurrent Users**<br><br>The proposed system should support at minimum 30 concurrent users. | The Bidder must provide substantive evidence that the proposed system will support at minimum 30 concurrent users. |
| **R7.13** | **Inactive Users**<br><br>The proposed system should allow Parks Canada to populate portions of the system with inactive users (for legacy purposes). | The Bidder must provide substantive evidence that the proposed system will allow Parks Canada to populate portions of the system with inactive users (for legacy purposes). |
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### 4.10.2 Help

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R8.1** | **Context-sensitive help**<br>The Help information displayed should always relate to the process being executed. | The Bidder must provide substantive evidence that the proposed system's help will be context-sensitive. |
| **R8.2** | **Help at the field level**<br>Help should be available to describe the proper content of a field during data entry or retrieval (tool tips). | The Bidder must provide substantive evidence that the proposed system's Help will be available to describe the proper content of a field during data entry or retrieval. |
| **R8.3** | **User-defined Help**<br>The proposed system should allow authorized users to add to or edit the current Help information. | The Bidder must provide substantive evidence that the proposed system will allow authorized users to add to or edit the current Help information. |
| **R8.4** | **Documentation availability**<br>All documentation should be available within the application. | The Bidder must provide substantive evidence that the proposed system will contain all documentation within the application. |
| **R8.5** | **Printable documentation**<br>All documentation should be available in a printable format. | The Bidder must provide substantive evidence that all documentation will be available in a printable format. |
| **R8.6** | **Support**<br>The Vendor should fully describe Support options, costs and availability. | The Bidder must fully describe support options, costs and availability. |
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### 4.10.3 Data import/export

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R9.1** | **Import Files**<br>The proposed system should allow users to import data/files into the system. | The Bidder must provide substantive evidence that the proposed system will allow users to import data/files into the system. |
| **R9.2** | **List of file types**<br>The Vendor should provide a list of all file types that can be imported into the proposed system without customization. | The Bidder must provide a list of all file types that can be imported into the proposed system without customization. |
| **R9.3** | **Field selection available**<br>The proposed system should allow users to | The Bidder must provide substantive evidence that the proposed system will |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | import ASCII files and load the information into specific fields (e.g. create a word processing file containing information for Object Number and Object Name). | allow users to import ASCII files and load the information into specific fields. |
| **R9.4** | **Bulk Data Import Tool**<br>The Vendor should provide a tool to perform bulk imports of data to the proposed system from other internal Parks Canada systems. | The Bidder must provide substantive evidence that the Vendor will provide a tool to perform bulk imports of data to the proposed system from other internal Parks Canada systems. |
| **R9.5** | **Field validation**<br>The proposed system should perform field validation when importing data. | The Bidder must provide substantive evidence that the proposed system will perform field validation when importing data. |
| **R9.6** | **Duplicate checking**<br>When importing data, the proposed system should check for duplicate records. | The Bidder must provide substantive evidence that the proposed system will check for duplicate records when importing data. |
| **R9.7** | **Bypass field validation**<br>The proposed system should permit bypassing of field validation during imports and generate appropriate error reports. | The Bidder must provide substantive evidence that the proposed system will allow permit bypassing of field validation during imports and generate appropriate error reports. |
| **R9.8** | **Long fields**<br>The proposed system should provide a report if data has been rejected or truncated on import. | The Bidder must provide substantive evidence that the proposed system will provide a report if data has been rejected or truncated on import. |
| **R9.9** | **Import XML**<br>The proposed system should import in XML. | The Bidder must provide substantive evidence that the proposed system will allow for importing from XML. |
| **R9.10** | **List XML import standards**<br>The Vendor should list the XML import standards followed (e.g. Dublin Core or SPECTRUM). | The Vendor will list the XML import standards followed. |
| **R9.11** | **Spreadsheet**<br>The proposed system should allow data to be imported from spreadsheet software (MS Excel). | The Bidder must provide substantive evidence that the proposed system will allow data to be imported from spreadsheet software. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R9.12** | **Specify import formats**<br>The Vendor should list import formats available (e.g. Delimited ASCII, MARC, SGML, etc.). | The Vendor will list import formats available. |
| **R9.13** | **Export Files**<br>The proposed system should allow the user to export data/files. | The Bidder must provide substantive evidence that the proposed system will allow the user to export data/files. |
| **R9.14** | **List of file types**<br>The Vendor should provide a list of all file types that can be exported from the proposed system without customization. | The Vendor will provide a list of all file types that can be exported from the proposed system without customization. |
| **R9.15** | **Bulk Data Export Tool**<br>The Vendor should provide Parks Canada with a tool to perform bulk exports of data from the proposed system for use in other internal Parks Canada systems. | The Vendor will provide Parks Canada with a tool to perform bulk exports of data from the proposed system for use in other internal Parks Canada systems. |
| **R9.16** | **Multi User Data Exports**<br>The proposed system should provide a data export tool that allows multiple data exports to be set up, used and saved by multiple Parks Canada users. | The Bidder must provide substantive evidence that the proposed system will include a data export tool that allows multiple data exports to be set up, used and saved by multiple Parks Canada users. |
| **R9.17** | **Data Export Formats**<br>At minimum, the data export tool should support exports in the following formats:<br>a) XML<br>b) CSV | The Bidder must provide substantive evidence that the data export tool will support exports in the following formats:<br>a) XML<br>b) CSV |
| **R9.18** | **Field selection available**<br>The export function should allow users to select fields to be exported (e.g. export the Object Number and Object Name data). | The Bidder must provide substantive evidence that the export function will allow users to select fields to be exported. |
| **R9.19** | **Dynamic Data Exchange**<br>The proposed system should support DDE (Dynamic Data Exchange) or equivalent (e.g. link to a range of cells in a spreadsheet). | The Bidder must provide substantive evidence that the proposed system will support DDE (Dynamic Data Exchange) or equivalent. |
| **R9.20** | **Specify export formats**<br>The Vendor should list other export formats that are supported by the proposed system (e.g. Delimited ASCII, MARC, etc.) | The Vendor will list other export formats that are supported by the proposed system. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R9.21** | **Export XML**<br>The proposed system should be able to export XML in a standard (e.g. Dublin Core or SPECTRUM) or customizable format. | The Bidder must provide substantive evidence that the proposed system will be able to export XML in a standard or customizable format. |
| **R9.22** | **Spreadsheet**<br>The proposed system should allow data to be exported to spreadsheet software (MS Excel). | The Bidder must provide substantive evidence that the proposed system will allow data to be exported to spreadsheet software. |
| **R9.23** | **Interoperability**<br>The proposed system should allow for the exchange of data with other systems based on interoperability standards (e.g. OAI, Dublin Core). | The Bidder must provide substantive evidence that the proposed system will allow for the exchange of data with other systems based on interoperability standards. |
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### 4.10.4 Features

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R10.1** | **Customized sort table**<br>The proposed system should allow sort tables to be customized to change the order (collating sequence) of the results (e.g. sort accession numbers in a logical order). | The Bidder must provide substantive evidence that the proposed system will allow sort tables to be customized to change the order of the results. |
| **R10.2** | **Multi-tasking**<br>The proposed system should allow the user to interrupt what they are doing to perform other tasks without losing their data. | The Bidder must provide substantive evidence that the proposed system will allow the user to interrupt what they are doing to perform other tasks without losing their data. |
| **R10.3** | **Support barcodes**<br>The proposed system should support barcode information. | The Bidder must provide substantive evidence that the proposed system will support bar code information. |
| **R10.4** | **Barcode software**<br>The proposed system should be barcode software compatible. | The Bidder must provide substantive evidence that the proposed system will be bar code software compatible |
| **R10.5** | **Support peripherals for input**<br>The proposed system should allow information scanned by a peripheral such as a barcode scanner to be uploaded into the system. | The Bidder must provide substantive evidence that the proposed system will allow information scanned by a peripheral such as a bar code scanner to be uploaded into the system. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
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### 4.10.5 Geographic Information System

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R11.1** | **Show on Map**<br>A "Show on Map" (or similar) button in CRMIS sends a call to the map system. The call includes identifiers required by the map to understand which GIS layer needs to be presented, and which entity in that layer needs to be highlighted. | The Bidder should provide substantive evidence that the proposed system will have a "Show on Map" (or similar) button that will send a call to the map system as detailed in R11.1. |
| **R11.2** | **Supply summary information about map entities**<br>CRMIS will supply summary information about map entities to the mapping system. This can be done by offering an SOA service, providing access to the database by Parks Canada's GIS, or by periodically exporting CRMIS data to the GIS database. | The Bidder should provide substantive evidence that the proposed system will be able to supply summary information about map entities to the mapping system as detailed in R11.3. |
| **R11.3** | **Access to attributes**<br>The system should provide access to CRMIS attributes in linked and related tables so that Parks Canada can provide summary CRMIS GIS data to other enterprise applications. One possible approach is to provide periodic exports of CRMIS data for records that have linked GIS records. | The Bidder should provide substantive evidence that the proposed system will provide access to attributes in linked and related tables so that Parks Canada can provide summary CRMIS GIS data to other enterprise applications. |
| **R11.4** | **Read-only database access**<br>The system should provide read-only database access to CRMIS attributes in linked and related tables so that Parks Canada Geomatics Specialists can conduct detailed GIS analyses on cultural resources. | The Bidder should provide substantive evidence that the proposed system will provide read-only database access to attributes in linked and related tables so that Parks Canada Geomatics Specialists can conduct detailed GIS analyses on cultural resources. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R11.5** | **Access to the digital media**<br>CRMIS should provide access to the digital media by the map system.<br>1. The User sees an arrow or a dot on the map indicating that a digital asset pertains to that point. (Mapping of the points is handled by PC)<br>2. The user clicks on the point and a pop-up displays the media (display handled by PC)<br>3. CRMIS should provide access to the digital media so that Step 2 can happen. | The Bidder should provide substantive evidence that the proposed system will provide access to the digital media by the map system. |
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### 4.10.6 Security

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R12.1** | **Multi-level security**<br>The proposed system should provide security for different levels of users (e.g. Administrator, Archaeologist, Curator, Historian, Field Unit CRM specialist, researcher, and student). | The Bidder must provide substantive evidence that the proposed system will provide security for different levels of users. |
| **R12.2** | **Password administration**<br>The proposed system should provide methods for initiating and changing user passwords. | The Bidder must provide substantive evidence that the proposed system will provide methods for initiating and changing user passwords. |
| **R12.3** | **User function security**<br>The proposed system should allow system administrators to define security at the function level (e.g. allow a user to access data entry functions only). | The Bidder must provide substantive evidence that the proposed system will allow system administrators to define security at the function level. |
| **R12.4** | **File security**<br>The proposed system should allow system administrators to control access for different levels of users to one or more specific areas. | The Bidder must provide substantive evidence that the proposed system will allow system administrators to control access for different levels of users to one or more specific areas. |
| **R12.5** | **Field(s) security**<br>The proposed system should provide controls to limit access to one or more specific fields within the system (e.g. amending location information). | The Bidder must provide substantive evidence that the proposed system will provide controls to limit access to one or more specific fields within the system. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R12.6** | **Record(s) security**<br>The proposed system should provide controls to limit access to a specific record or group of records within the system. | The Bidder must provide substantive evidence that the proposed system will provide controls to limit access to a specific record or group of records within the system. |
| **R12.7** | **Security by business function**<br>The proposed system should provide controls to limit access to one or more specific business functions within the system. | The Bidder must provide substantive evidence that the proposed system will provide controls to limit access to one or more specific business functions within the system. |
| **R12.8** | **Record amendment security**<br>When a record is being amended by a user, that record should be protected from being changed or deleted by other users. | The Bidder must provide substantive evidence that the proposed system will protect records from being changed or deleted by other users when a record is being amended by a user. |
| **R12.9** | **Record locked & available**<br>When a record is being amended by a user, that record should be available to other users in read-only mode. | The Bidder must provide substantive evidence that the proposed system will make records available to other users in read-only mode when a record is being amended by a user. |
| **R12.10** | **Record locked & not available**<br>When a record is being amended by a user, that record should be unavailable to other users. | The Bidder must provide substantive evidence that the proposed system will make records unavailable when a record is being amended by a user. |
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### 4.10.7 Digital assets

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R13.1** | **Indexing**<br>The proposed system should be able to index digital assets. | The Bidder must provide substantive evidence that the proposed system will be able to index digital assets. |
| **R13.2** | **Digital Asset catalogue number**<br>The proposed system should be able to assign catalogue numbers to the various digital asset types based on the information provided in Annex C - Data Dictionary (Digital Asset Cataloguing). | The Bidder must provide substantive evidence that the proposed system will be able to assign catalogue numbers to the various digital asset types based on the information provided in Annex C - Data Dictionary (Digital Asset Cataloguing). |
| **R13.3** | **Digital asset support** | The Bidder must provide substantive evidence that the proposed system will be |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | The proposed system should be able to support at minimum the following media and file types:<br>A. Word Processing documents. (*.doc, *.docx, *.wpd)<br>B. Adobe Portable Document Format (PDF)<br>C. Image files (*.jpg, *.gif, *.tif, etc.)<br>D. MS Excel spreadsheets. (*.xls, *.xlsx)<br>E. Video files<br>F. Audio files<br>G. Streaming data<br>H. Animation files<br>I. 3-D imaging. (*.mov, *.dwg)<br>J. CAD files. (*.dwg, *.mdx, AutoCAD DXF) | able to support at minimum the media and file types listed in R13.3. |
| **R13.4** | **Associated files**<br>The proposed system should be able to associate all digital file types to an object, an artifact, a site/location, an archaeological feature, operation, sub-operation, lot, sub-lot, or groups, collections, surveys and activities. | The Bidder must provide substantive evidence that the proposed system will be able to associate all digital file types to an object, an artifact, a site/location, an archaeological feature, operation, sub-operation, lot, sub-lot, or groups, collections, surveys and activities. |
| **R13.5** | **File viewing**<br>The proposed system should allow files to be viewed from the application. | The Bidder must provide substantive evidence that the proposed system will allow files to be viewed from the application. |
| **R13.6** | **View both images and text**<br>The proposed system should allow images and text to be viewed together on the same screen (eg. Image with caption). | The Bidder must provide substantive evidence that the proposed system will allow images and text to be viewed together on the same screen. |
| **R13.7** | **Multiple image association**<br>The proposed system should be able to associate multiple images to an object, an artifact, a site/location, an archaeological feature, operation, sub-operation, lot, sub-lot, or groups, collections, surveys and activities. | The Bidder must provide substantive evidence that the proposed system will be able to associate multiple images to an object, an artifact, a site/location, an archaeological feature, operation, sub-operation, lot, sub-lot, or groups, collections, surveys and activities. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R13.8** | **Digital asset display**<br>The proposed system should be able to display all associated digital assets as part of the core information for an object, an artifact, a site/location, an archaeological feature, operation, sub-operation, lot, sub-lot, or groups, collections, surveys and activities. | The Bidder must provide substantive evidence that the proposed system will be able to display all associated digital assets as part of the core information for an object, an artifact, a site/location, an archaeological feature, operation, sub-operation, lot, sub-lot, or groups, collections, surveys and activities. |
| **R13.9** | **Digital asset restrictions**<br>The proposed system should allow system administrators to limit the number of digital assets allowed per entity in the system. | The Bidder must provide substantive evidence that the proposed system will allow system administrators to limit the number of digital assets allowed per entity in the system. |
| **R13.10** | **Reference to original images**<br>The proposed system should allow users to document information about the original image (e.g. image reference number, classification, storage location). | The Bidder must provide substantive evidence that the proposed system will allow users to document information about the original image. |
| **R13.11** | **Reference to original documents**<br>The proposed system should allow users to document information about the original documents (e.g. field notes, classification, storage location). | The Bidder must provide substantive evidence that the proposed system will allow users to document information about the original documents. |
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### 4.10.8 Controlled vocabularies

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R14.1** | **Authority control with system**<br>The proposed system should allow for authority control within the system. | The Bidder must provide substantive evidence that the proposed system will allow for authority control within the system. |
| **R14.2** | **Update authority lists procedure**<br>The proposed system should be able to provide a procedure to update an authority list. | The Bidder must provide substantive evidence that the proposed system will be able to provide a procedure to update an authority list. |
| **R14.3** | **Fields with authority control**<br>The proposed system should allow the authorized user to choose the fields for authority control. | The Bidder must provide substantive evidence that the proposed system will allow the authorized user to choose the fields for authority control. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R14.4** | **Integrate pre-built authority lists**<br>The proposed system should allow external pre-built authority lists to be integrated into the system at any time. | The Bidder must provide substantive evidence that the proposed system will allow external pre-built authority lists to be integrated into the system at any time. |
| **R14.5** | **Authority lists for entry and validation**<br>The proposed system should allow authority lists to be employed to assist users in the entry and validation of data (e.g. user can select from the authority list during data entry). | The Bidder must provide substantive evidence that the proposed system will allow authority lists to be employed to assist users in the entry and validation of data. |
| **R14.6** | **Authority lists included in the proposed system**<br>The Vendor should provide authority lists that are included in the proposed system. | The Vendor will provide authority lists that are included in the proposed system. |
| **R14.7** | **Authority lists for search**<br>Users should be able to use authority lists to assist in the formulation of search criteria (e.g. user can select from the authority list to help select terms to enter as search criteria). | The Bidder must provide substantive evidence that the proposed system will allow users to use authority lists to assist in the formulation of search criteria. |
| **R14.8** | **Authorization to alter authority lists**<br>The proposed system should allow authorized users to control permissions to add, change, and delete terms in an authority list. | The Bidder must provide substantive evidence that the proposed system will allow authorized users to control permissions to add, change, and delete terms in an authority list. |
| **R14.9** | **Print authority lists**<br>The Vendor should ensure that all authority lists can be printed. | The Bidder must provide substantive evidence that the proposed system will allow all authority lists to be printed. |
| **R14.10** | **Several authority lists used within one field**<br>The proposed system should allow for different authority lists to be used within a single field (e.g. Object Name field has separate term list for Curatorial, Archaeology). | The Bidder must provide substantive evidence that the proposed system will allow for different authority lists to be used within a single field. |
| **R14.11** | **Deletion/change of terms - implications for records**<br>The proposed system should be able to handle the change or deletion of an authority term if the term is currently used in the records. | The Bidder must provide substantive evidence that the proposed system will be able to handle the change or deletion of an authority term if the term is currently used in the records. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R14.12** | **Thesaural control with system**<br>Thesaural control should be available within the proposed system. | The Bidder must provide substantive evidence that Thesaural control will be available within the proposed system. |
| **R14.13** | **Update thesaurus files procedure**<br>The proposed system should provide a procedure to update thesauri files. | The Bidder must provide substantive evidence that the proposed system will provide a procedure to update thesauri files. |
| **R14.14** | **Fields with thesaural control**<br>The proposed system should allow authorized users to choose the fields for thesaural control. | The Bidder must provide substantive evidence that the proposed system will allow authorized users to choose the fields for thesaural control. |
| **R14.15** | **Integrate pre-built thesaural files**<br>The proposed system should allow external pre-built thesauri (e.g. Thesaurus of Geographic Names, or a locally-built thesaurus that are already in use by PC) to be imported and integrated within the system. | The Bidder must provide substantive evidence that the proposed system will allow external pre-built thesauri to be imported and integrated within the system. |
| **R14.16** | **Thesauri for entry and validation**<br>The proposed system should allow thesauri to be used to assist in the entry and validation of data (e.g user can browse and select from the thesaurus during data entry). | The Bidder must provide substantive evidence that the proposed system will allow thesauri to be used to assist in the entry and validation of data. |
| **R14.17** | **Thesauri for search**<br>The proposed system should allow for thesauri to be used to assist in the formulation of search criteria (e.g. user can browse and select from the thesaurus to help select terms to enter as search criteria). | The Bidder must provide substantive evidence that the proposed system will allow for thesauri to be used to assist in the formulation of search criteria. |
| **R14.18** | **Authorization to alter thesaurus**<br>The proposed system should provide control over who can add, change, and delete terms in thesauri files. | The Bidder must provide substantive evidence that the proposed system will provide control over who can add, change, and delete terms in thesauri files. |
| **R14.19** | **Thesaurus viewed hierarchically**<br>Users should be able to view and browse the terms in the thesaurus hierarchically. | The Bidder must provide substantive evidence that the proposed system will allow users to view and browse the terms in the thesaurus hierarchically. |
| **R14.20** | **Print thesauri files**<br>The proposed system should allow all thesaurus files to be printed. | The Bidder must provide substantive evidence that the proposed system will allow all thesaurus files to be printed. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R14.21** | **Display all thesaurus information**<br>The proposed system should be able to display all information associated with thesauri terms (e.g. relationships, definition, scope notes, etc.). | The Bidder must provide substantive evidence that the proposed system will able to display all information associated with thesauri terms. |
| **R14.22** | **Monolingual and multilingual thesaurus, ISO standard**<br>The proposed system should support ISO 25964-1:2011 - Information and documentation -- Thesauri and interoperability with other vocabularies -- Part 1: Thesauri for information retrieval. | The Bidder must provide substantive evidence that the proposed system will support ISO 25964-1:2011 - Information and documentation -- Thesauri and interoperability with other vocabularies -- Part 1: Thesauri for information retrieval. |
| **R14.23** | **Change of terms - implications for records**<br>The proposed system should be able to handle the change of thesauri terms if the terms are currently used in the records. | The Bidder must provide substantive evidence that the proposed system will be able to handle the change of thesauri terms if the terms are currently used in the records. |
| **R14.24** | **Change of terms - implications for narrower terms**<br>The proposed system should be able handle the change of thesauri terms which have narrower terms linked to them. | The Bidder must provide substantive evidence that the proposed system will be able handle the change of thesauri terms which have narrower terms linked to them. |
| **R14.25** | **Deletion of terms - implications for records**<br>The proposed system should be able to handle the deletion of thesauri terms if the terms are currently used in the records. | The Bidder must provide substantive evidence that the proposed system will be able to handle the deletion of thesauri terms if the terms are currently used in the records. |
| **R14.26** | **Prevent deletion of terms which have narrower terms**<br>The proposed system should prevent the user from deleting thesauri terms which have narrower terms linked to them. | The Bidder must provide substantive evidence that the proposed system will prevent the user from deleting thesauri terms which have narrower terms linked to them. |
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### 4.10.9 Indexes

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R15.1** | **Restructuring of affected indexes**<br>The proposed system should be usable while indexes are being rebuilt. | The Bidder must provide substantive evidence that the proposed system will be usable while indexes are being rebuilt. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
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### 4.10.10 Backups

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R16.1** | **Database Backup**<br>The proposed system database should be compatible with the Commvault DB back up tool used by Shared Services Canada.<br>See http://www.commvault.com for product details | The Bidder must provide substantive evidence that the proposed system database will be compatible with the Commvault DB back up tool used by Shared Services Canada. |
| **R16.2** | **Backup and recovery processes**<br>The proposed system should have built in backup and recovery processes. | The Bidder must provide substantive evidence that the proposed system will have built in backup and recovery processes. |
| **R16.3** | **Back-end database back-up and recovery**<br>The standard functionality of the back-end database should completely back-up and recover the proposed system. This includes data, settings, transactions, users, interface, etc. | The standard functionality of the back-end database will completely back-up and recover the proposed system. |
| **R16.4** | **Backup processes**<br>The proposed system should have built-in backup processes or use the standard functionality of the back-end database for backups. | The Bidder must provide substantive evidence that the proposed system will have built-in backup processes or use the standard functionality of the back-end database for backups. |
| **R16.5** | **Recovery processes**<br>The proposed system should have built-in recovery processes or use the standard functionality of the back-end database for recovery. | The Bidder must provide substantive evidence that the proposed system will have built-in recovery processes or use the standard functionality of the back-end database for recovery. |
| **R16.6** | **Automated backups**<br>The backup process should be automated. | The Bidder must provide substantive evidence that the proposed system will have automated backup processes. |
| **R16.7** | **Automated recovery**<br>The recovery process should be automated. | The Bidder must provide substantive evidence that the proposed system will have automated recovery processes. |

### 4.10.11 Audit reports

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R17.1** | **Reporting**<br>The proposed system data should be compatible with SQL Server Reporting Services (SSRS). | The Bidder must provide substantive evidence that the proposed system data will be compatible with SQL Server Reporting Services (SSRS). |
| **R17.2** | **Deleted records**<br>For deleted records, the proposed system should provide a report containing all deleted content. | The Bidder must provide substantive evidence that the proposed system will provide a report containing all deleted content. |
| **R17.3** | **User access profiles**<br>The proposed system should provide a report of all user access profiles. | The Bidder must provide substantive evidence that the proposed system will provide a report of all user access profiles. |
| **R17.4** | **Audit report on module activity**<br>The proposed system should provide a report of functional usage by user ID of system activity over a specific period (e.g. list the number of times each type of system activity (report, query, accession) was accessed on a certain day by a user). | The Bidder must provide substantive evidence that the proposed system will provide a report of functional usage by user ID of system activity over a specific period. |
| **R17.5** | **Audit module usage**<br>The proposed system should provide a report by system activity on user access over a specific period. | The Bidder must provide substantive evidence that the proposed system will provide a report by system activity on user access over a specific period. |
| **R17.6** | **Query report**<br>The proposed system should provide a report of the queries performed by users. | The Bidder must provide substantive evidence that the proposed system will provide a report of the queries performed by users. |
| | | |

### 4.10.12 Product demonstration rated requirements

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R18.1** | **Collections and Curatorial Processes**<br>Compliance to the following Collections Trust SPECTRUM 4.0 procedures:<br>• Object Entry<br>• Acquisition | The Bidder should demonstrate how the product complies with the SPECTRUM processes identified in R18.1. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | • Cataloguing<br>• Location and movement control<br>• Loans in<br>• Loans out<br>• Object exit<br>• Retrospective documentation | |
| **R18.2** | **Conservation and Conservation Sciences**<br>Compliance to the following Collections Trust SPECTRUM 4.0 procedures:<br>• Object Condition checking and technical assessment<br>• Conservation and collections care | The Bidder should demonstrate how the product complies with the SPECTRUM processes identified in R18.2. |
| **R18.3** | Archaeological sites and their related artifacts. | The Bidder should demonstrate how the proposed system would manage archaeological sites and their related artifacts. |
| **R18.4** | Digital assets linked or attached to objects and sites. | The Bidder should demonstrate how digital assets are linked or attached to objects and sites. |
| **R18.5** | Images for objects and sites. | The Bidder should demonstrate how the proposed system would handle images for objects and sites. |
| **R18.6** | Alignment to Parks Canada Requirements based on the Bidder's understanding of the project. | The Bidder should demonstrate how the proposed system aligns to Parks Canada's requirements based on *4.3.1.2 Project Understanding and Approach*. |
| **R18.7** | Additional product functionality and features for which the Bidder received points. | The Bidder should demonstrate their product's additional functionality and features that were submitted for section *7 Additional Functionality and Features*. |

## 4.11 Application integration requirements

The Vendor should provide necessary tools and methods of connecting to the various components of the proposed system such as an application programming interface (API), scripting environment or software development kit (SDK) to ease integration with other systems within Parks Canada. The Vendor should also provide integrated development environment (IDE) recommendations.

For example:

- Communications protocols
- Web services, SOAP, XML, etc.

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **R19.1** | Web Services<br><br>The proposed system should be able to consume data from Web services as well as output data as a Web service. | The Bidder must provide substantive evidence that the proposed system supports Web services input/output. |
| **R19.2** | The Vendor should provide necessary tools and methods of connecting to the various components of the proposed system such as an application programming interface (API) | The Bidder will provide an application programming interface (API) |
| **R19.3** | The Vendor should provide the necessary scripting environment or software development kit (SDK) to ease integration with other systems within Parks Canada. | The Bidder will provide a software development kit (SDK). |
| **R19.4** | The Vendor should provide integrated development environment (IDE) recommendations. | The Bidder will recommend an integrated development environment (IDE). |

# 5 Security and Privacy Requirements

The Vendor must deliver all requirements identified in this section at the dates specified in the Schedule of Deliverables.

This section details the minimum security and privacy requirements that the Vendor must meet to ensure that the security and privacy measures specified in this document are implemented and maintained throughout the Contract. These requirements have been developed based on a combination of Government of Canada (GC) security policies and industry best practices. The key objective is to develop a risk managed security and privacy solution that provides an adequate level of protection at an acceptable level of risk.

It is accepted and understood that technology evolves at a pace that exceeds the abilities of large bureaucracies to adapt to change. This includes security technologies and technologies that support electronic transactions across the Internet. Over the duration of the contract, security technology may very well evolve and change. The Vendor's management of the solution must account for these technological changes that will occur during the life of the system and allow for the adoption of new or updated security or privacy features on an as and when needed basis. For this reason, the Government of Canada has adopted a proactive and integrated security and privacy managed risk approach that must be implemented by the Vendor and kept active throughout the life cycle of the CRMIS. This is based on the following:

**Vendor personnel who require access to PROTECTED information, assets or sensitive work sites shall EACH hold a valid ENHANCED RELIABILITY screening, granted or approved by CIISD.**

**The Vendor SHALL NOT remove any PROTECTED information or assets from the identified work site(s), and the Vendor shall ensure that its personnel are made aware of and comply with this restriction.**

## 5.1 CRMIS Data Profile

The data in the system will be designated as approximately 80% unclassified/undesignated and 20% Protected A (PA). The security requirements for Protected A data can be found in "Security Requirements Checklist and Conceptual CRMIS Data Profile" and in the PWGSC Industrial Security Manual (ISM) at the following link (http://ssi-iss.tpsgc-pwgsc.gc.ca/msi-ism/index-eng.html).

## 5.2 Scope of the CRMIS Security and Privacy Requirements

The organizations that are included within the scope of the security and privacy requirements identified in this annex are those that will provide the core services to government and any organization involved with Business Continuity and/or Disaster Recovery for these core service organizations.

## 5.3 Facility and Personnel Security

### 5.3.1 SA-1 – Security Validation Requirements

The Vendor must:

a) Validate that the listed security and privacy requirements were incorporated into the design and subsequently implemented;
b) Submit the required deliverables to the Government of Canada for review; and
c) Implement design changes requested as a result of Government of Canada review to ensure that the service design adequately satisfies all of the service's security requirements.

**Description of the Security Validation Activity**

The purpose of security validation is to establish, through design specifications, a correspondence between an information system's security requirements and the security safeguards that implement those security requirements. Validation establishes assurance that the information system's design fully satisfies its security requirements. At a minimum, the Vendor must establish this correspondence between the security requirements and the security safeguards that implement them.

**Security Validation Deliverables**

The deliverables from the security validation activity are as follows:

a) A Security Requirements Traceability Matrix (SRTM) that contains, at a minimum, the following information:
b) The security requirements marked for security validation in this document; and
c) For each security requirement, the reference within the service design specifications documents where the security safeguard or safeguards that implement the security requirements are described.
d) Service documentation referenced in the SRTM that:
e) Describe the security safeguards in sufficient details to allow the Government of Canada to confirm that they satisfy the security requirements; and
    i) Reflect the approved changes implemented as a result of the Government of Canada's review.
    ii) Security Validation Acceptance Criteria

The Government of Canada will accept the deliverables and sign-off on the security validation activity if the following conditions are met:

a) The deliverables are submitted to the Government of Canada and they satisfy the requirements specified above; and
b) The Vendor has implemented the changes requested by the Government of Canada as witnessed in revised versions of the SRTM and the service documentation.

### 5.3.2 SA-2 – Security Verification Requirements

The Vendor must:

a) Verify the security safeguards associated with the security requirements marked for security verification in this annex against the production version of the CRMIS; and
b) Submit the required deliverables to the Government of Canada for review.

**Description of the Security Verification Activity**

The purpose of security verification is to confirm that the security safeguards have been implemented correctly within the implemented CRMIS and that they meet the applicable standards as specified in the service design specifications. The Vendor will develop and execute the security verification procedures while the Government of Canada representatives will witness the execution of the security verification procedures.

**Security Verification Deliverables**

The deliverables from the security verification activity are as follows:

a) A security verification report that contains, at a minimum, the following information:

i. For each of the security safeguards that satisfy one of more of the security requirements marked for security verification in this document, a security verification procedures that describes what the Vendor must execute in order to confirm that the security safeguard has been implemented correctly and that it satisfies applicable standards as specified in the service design specifications and the expected result;
ii. For each security verification procedure, the actual result that the Vendor obtained or observed;
iii. Any deviations from the expected results;
iv. For each deviation that could be corrected at the time of verification, a description of the corrective measure or measures that were implemented in the production version of the CRMIS; and
v. For each deviation that could not be corrected at the time of verification (e.g. due to more significant changes) a change management record number.

b) The SRTM revised to include the tracing between security requirements and the security verification procedures; and
c) Service documentation referenced in the SRTM that reflects the approved changes implemented as a result of the Government of Canada's review.

**Security Verification Acceptance Criteria**

The Government of Canada will accept the deliverables and sign-off on the security verification activity if the following conditions are met:

a) The deliverables are submitted to the Government of Canada and they satisfy the requirements above; and

The Vendor either has implemented or will implement the changes requested by the Government of Canada as witnessed in revised versions of the SRTM and the service design specification

# 6 Parks Canada Training Requirements

## 6.1 Pre-User Acceptance Testing System Demonstration

The Vendor should conduct a webinar/videoconference with the Parks Canada User Acceptance Test Team (approximately 8 to 12 persons at various locations) where the Vendor will walk through the system and the Parks Canada-specific functionality in preparation for the Parks Canada UAT phase. This demonstration should include all functionality described within this SoW or as agreed upon between Parks Canada and the Vendor.

This pre-UAT System Demonstration should be conducted 1-3 business days before the start of the scheduled UA Test period. Parks Canada will be responsible for booking the webinar for the participants. The Vendor will be responsible for conducting the System Demonstration and answering participants' questions pertaining to the system.

## 6.2 "Train-the-Trainer"

The Vendor should conduct a webinar(s) with the Parks Canada trainers where the Vendor will walk through the management aspects of the system and the Parks Canada-specific functionality to enable the Parks Canada trainers to train their internal team.

## 6.3 Training Logistics

The “Train-the-Trainer” sessions should be conducted at selected Parks Canada locations. For costing purposes assume that the locations are Quebec, Ottawa and Winnipeg. The “Canada West” session will be conducted in English only. The “Canada East” training should be conducted consecutively with one session conducted in English and a second session conducted in French.

The Vendor will be responsible for their travel costs, shipping of any training materials and related costs for on-site training delivery. All training material should be available in both English and French. Parks Canada expects that the “Train-the-Trainer” sessions are to be no longer than three days in length. Parks Canada will be responsible for providing the venue and the equipment to conduct the training.

The Vendor should provide on-line accessible training manuals for Parks Canada, covering all aspects of the System. These on-line training manuals should be:

A. available in both English and French;
B. be accessible and available throughout the contract term;
C. printable by all pages, specific Chapter, or specific page range; and
D. accessible from the Production and Training environments.

At the end of the training sessions, there will be a participant feedback form to verify that the session had the desired results in the education of the group. The results from this audience feedback will be used to decide if the performance objectives have been met for each session.

This training should take place a minimum of two weeks prior to the System's Implementation.

## 6.4 Training Plan Deliverable

During the Project life cycle, the Vendor should provide the following Training Plan for the initial system “Train-the-Trainer” session.

The Vendor’s Training Plan should include the following information:

- Proposed training schedule (Day 1, Day 2, Day 3);
- Core modules;
- Outline of the sections;
- Audience for the module (Specialists vs. Supervisors and Managers);
- Length of time to present the module;
- Hands-on practice or exercises to be completed by the attendees;
- Electronic teaching materials and aids; and
- Number of participants in each session.

Parks Canada will assign a Project Training Coordinator to work with the Vendor’s Training Team to aid in understanding the Parks Canada work environment, participants, etc. to help in developing the Training Plan and Materials. The Parks Canada Project Training Coordinator will conduct a final quality check on the training materials and all documentation. All materials should be approved by the Parks Canada Project Training Coordinator before they are delivered to the Parks Canada audiences.

## 6.5 Post-Launch User Documentation

The Vendor should provide Parks Canada “print ready” electronic versions of user manuals in French and English.

The Vendor is responsible for updating the manuals when they introduce or implement new functionality.

Parks Canada retains the right to reproduce any training materials for internal training, refresher courses or for sessions for new staff following implementation.

# 7 Additional Functionality and Features

## 7.1 Additional Functionality

**Note:** If the Vendor is awarded points for any of the Additional Functionality during the Bid Evaluation, upon Contract award the Contracting Authority will amend the Contractual Obligations of Contractor's Bid Response section to reflect that these features will now form part of the Contract and the Contractor will be required to provide these features in accordance with and at the prices contained in Annex B – Basis of Payment.

Bidders should respond to the Additional Functionality Requirements using *Response Table 4 - Additional Functionality and Features.*

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **General** | | |
| **A1.1** | **Repeatable field**<br>The proposed system should allow a field entry to be flagged as being repeatable for subsequent entries until the flag is removed. | The Bidder must provide substantive evidence that the proposed system will allow a field entry to be flagged as being repeatable for subsequent entries until the flag is removed. |
| **A1.2** | **Repeatable multiple entries**<br>The proposed system should allow multiple entries to be flagged as being repeatable for subsequent entries until the flag is removed. | The Bidder must provide substantive evidence that the proposed system will allow multiple entries to be flagged as being repeatable for subsequent entries until the flag is removed. |
| **A1.3** | **Data formatting**<br>The proposed system should support text formatting standards (italic, bold, underline, etc.). | The Bidder must provide substantive evidence that the proposed system will support text formatting standards. |
| **A1.4** | **Add terms to spell checker**<br>Users should be able to add terms to the spell checker. | The Bidder must provide substantive evidence that the proposed system will allow users to add terms to the spell checker. |
| **A1.5** | **Date entry**<br>The proposed system should have date pickers and pop-up calendars available to users where applicable and ensure the ISO date standard is followed (YYYY-MM-DD). | The Bidder must provide substantive evidence that the proposed system will have date pickers and pop-up calendars available to users where applicable and ensure the ISO date standard is followed. |
| **A1.6** | **Date searching**<br>The proposed system should allow a | The Bidder must provide substantive evidence that the proposed system will |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | user to specify the date format for searching. | allow a user to specify the date format for searching. |
| **A1.7** | **Date display**<br>The proposed system should allow the user to specify the date format for display. | The Bidder must provide substantive evidence that the proposed system will allow the user to specify the date format for display. |
| **A1.8** | **Date output**<br>The proposed system should allow the user to specify the date format for output (e.g. reports). | The Bidder must provide substantive evidence that the proposed system will allow the user to specify the date format for output. |
| **A1.9** | **Date conversion**<br>The proposed system should have the ability to convert dates to a standard format (e.g. when entering dates different formats (050596, 05 MA 96, 05 May 1996, 19960505, 960505) can be entered and the proposed system will convert to a standard format). | The Bidder must provide substantive evidence that the proposed system will have the ability to convert dates to a standard format. |
| **A1.10** | **On-site training**<br>The Vendor should provide on-site training. | The Vendor will provide on-site training. |
| **A1.11** | **Overwrite pre-populated fields**<br>The proposed system should provide the author or administrator the ability to overwrite designated pre-populated metadata only where permissible.<br>This should not apply to all pre-populated fields, see Annex C – Data Dictionary for field details and exceptions. | The Bidder must provide substantive evidence that the proposed system will provide the author or administrator the ability to overwrite designated pre-populated metadata only where permissible. |
| **A1.12** | **Multi-tasking**<br>The proposed system should let the user interrupt what they are doing to perform other tasks without losing information. | The Bidder must provide substantive evidence that the proposed system will allow the user interrupt what they are doing to perform other tasks without losing information. |
| **Searching and reporting** | | |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **A2.1** | **Similar term search**<br><br>While executing a search, the proposed system should allow users to search for similar terms<br><br>For example, a 'smart search' which considers the context of terms. While searching 'vase' it suggests 'urn', etc. | The Bidder must provide substantive evidence that the proposed system will allow users to search for similar terms. |
| **Technical requirements** | | |
| **A3.1** | **Data model**<br><br>The proposed system should have an Open data model. | The Bidder must provide substantive evidence that the proposed system will have an Open data model. |
| **A3.2** | **Active Directories**<br><br>The proposed system should be compatible with MS Active Directories. | The Bidder must provide substantive evidence that the proposed system will be compatible with MS Active Directories. |
| **A3.3** | **Web Publishing**<br><br>The proposed system should provide a method or well defined process for publishing content to the Intranet/Internet. | The Bidder must provide substantive evidence that the proposed system will provide a method or well defined process for publishing content to the Intranet/Internet. |
| **A3.4** | **Filtered external source publishing**<br><br>The proposed system should provide a method of filtering the information that is published to external sources such as the Intranet/Internet as well as to other systems. | The Bidder must provide substantive evidence that the proposed system will provide a method of filtering the information that is published to external sources such as the Intranet/Internet as well as to other systems. |
| **A3.5** | **Ability to use Single Sign On**<br>Parks Canada employs active directories; the proposed system should leverage these directories so users do not have to sign in separately to access the proposed system. | The Bidder must provide substantive evidence that the proposed system will leverage MS active directories so users do not have to sign in separately to access the proposed system. |
| **Help** | | |
| **A4.1** | **Self-explanatory Help**<br>The on-line Help should be self-explanatory (should not consist only of | The Bidder must provide substantive evidence that the proposed system will have on-line help which is self-explanatory. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | codes that require the operator to consult a manual). | |
| **A4.2** | **User-built Help file**<br>The proposed system should allow users to build their own Help files (e.g. adding Help for a field which currently does not have Help). | The Bidder must provide substantive evidence that the proposed system will allow users to build their own Help files. |
| **A4.3** | **Error messages**<br>The proposed system should allow authorized users to customize error messages (e.g. generate an error message, change the wording in the error message, invoke new error message). | The Bidder must provide substantive evidence that the proposed system will allow users to customize error messages. |
| **A4.4** | **System documentation**<br>The Vendor should fully describe the components of the proposed system, including base software. | The Vendor will fully describe the components of the proposed system, including base software. |
| **A4.5** | **Product Development Roadmap**<br>The Vendor should provide a Product Development Roadmap which will include a list of planned features along with anticipated deliverable dates. | The Vendor will provide a Product Development Roadmap which will include a list of planned features along with anticipated deliverable dates. |
| **A4.6** | **Summary report**<br>The proposed system should generate a summary report for the import function listing such things as number of records read, rejected, accepted, etc. | The Bidder must provide substantive evidence that the proposed system will generate a summary report for the import function listing such things as number of records read, rejected, accepted, etc. |
| **Import/Export** | | |
| **A5.1** | **Duplicate checking defined by Database Administrator**<br>When importing records, the proposed system should check for duplicate records based on a key defined by the database administrator. | The Bidder must provide substantive evidence that the proposed system will check for duplicate records based on a key defined by the database administrator. |
| **A5.2** | **Hold for verification**<br>For records that have failed data validation during import, the proposed system should produce an error report or hold these records for user verification | The Bidder must provide substantive evidence that the proposed system will produce an error report or hold these records for user verification. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | (e.g. import data with an invalid term to an authority-controlled field). | |
| **A5.3** | **Data Export Scheduling**<br>The data export tool should allow for the scheduling of automatic exports on periodic bases (e.g. weekly, monthly). | The Bidder must provide substantive evidence that the proposed system will allow for the scheduling of automatic exports on periodic bases. |
| **A5.4** | **Fixed length records**<br>The proposed system should be able to export files having fixed length records. | The Bidder must provide substantive evidence that the proposed system will be able to export files having fixed length records. |
| **A5.5** | **Variable length records**<br>The proposed system should be able to export files having variable length records. | The Bidder must provide substantive evidence that the proposed system will be able to export files having variable length records. |
| **A5.6** | **Summary report**<br>The proposed system should be able to generate a summary report for the export function listing such things as number of records read, number of records exported, etc. | The Bidder must provide substantive evidence that the proposed system will able to generate a summary report for the export function listing such things as number of records read, number of records exported, etc. |
| **A5.7** | **Flag data records**<br>The proposed system should be able to flag the record(s) that have been exported. | The Bidder must provide substantive evidence that the proposed system will able to flag the record(s) that have been exported. |
| **A5.8** | **Flag data fields**<br>The proposed system should be able to flag the fields that have been exported. | The Bidder must provide substantive evidence that the proposed system will able to flag the fields that have been exported. |
| **A5.9** | **Word processor**<br>The proposed system should allow data to be imported from and exported to word processing software. | The Bidder must provide substantive evidence that the proposed system will allow data to be imported from and exported to word processing software. |
| **A5.10** | **ODBC Compliant**<br>The proposed system should be ODBC compliant. | The Bidder must provide substantive evidence that the proposed system will be ODBC compliant. |
| **Features** | | |
| **A6.1** | **Saving sort table**<br>The proposed system should allow a modified sort table to be saved for further use. | The Bidder must provide substantive evidence that the proposed system will allow a modified sort table to be saved for further use. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **A6.2** | **Reminder function**<br>The proposed system should notify a user of other necessary tasks. | The Bidder must provide substantive evidence that the proposed system will notify a user of other necessary tasks. |
| **A6.3** | **Measurement conversion**<br>The proposed system should automatically convert and display imperial and metric measurements. | The Bidder must provide substantive evidence that the proposed system will automatically convert and display imperial and metric measurements. |
| **A6.4** | **Converts measurements on reports**<br>The proposed system should automatically convert imperial and metric measurements for reports. | The Bidder must provide substantive evidence that the proposed system will automatically convert imperial and metric measurements for reports. |
| **A6.5** | **Selection of measurements**<br>The proposed system should allow users to select preferred measurement units for data entry, display, reports, etc. | The Bidder must provide substantive evidence that the proposed system will allow users to select preferred measurement units for data entry, display, reports, etc. |
| **A6.6** | **Overrides converted measurements**<br>The proposed system should change the values of the converted measurements (e.g. change converted measurements while in data entry mode). | The Bidder must provide substantive evidence that the proposed system will change the values of the converted measurements. |
| **A6.7** | **Barcode labels**<br>The proposed system should produce barcode labels. | The Bidder must provide substantive evidence that the proposed system will produce bar code labels. |
| **A6.8** | **Supports OCR**<br>The proposed system should support Optical Character Recognition (OCR). | The Bidder must provide substantive evidence that the proposed system will support Optical Character Recognition (OCR). |
| **Security** | | |
| **A7.1** | **Password security**<br>The proposed system should require all users to enter a password for access to the proposed system. | The Bidder must provide substantive evidence that the proposed system will require all users to enter a password for access to the proposed system. |
| **Digital Assets** | | |
| **A8.1** | **Other files**<br>Other digital asset formats should be supported, including any file format currently in use by the Parks Canada. | The Bidder must provide substantive evidence that the proposed system will support other digital asset formats, including any file format currently in use by the Parks Canada. |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| | The Vendor should list other supported digital asset formats. | The Vendor is to list other supported digital asset formats. |
| **A8.2** | **Automatic production of multiple image resolutions**<br>The proposed system should automatically produce images into multiple resolutions for display within the proposed system, for reports generated by the proposed system or for export. E.g. Thumbnail views, hi-res images. | The Bidder must provide substantive evidence that the proposed system will produce images into multiple resolutions for display within the proposed system, for reports generated by the proposed system or for export. |
| **A8.3** | **Options for display of images**<br>Users should have access to non-destructive editing features, such as dynamic rotate or resizing, that only change the way the image is displayed. | The Bidder must provide substantive evidence that the proposed system will allow users to access non-destructive editing features, such as dynamic rotate or resizing, that only change the way the image is displayed. |
| **A8.4** | **Maximum images**<br>The Vendor should provide Parks Canada with information about the maximum number of images that can be associated with an object, an object group, a site, an archaeological feature, operation, sub-operation, lot or sub-lot. | The Vendor is to provide Parks Canada with information about the maximum number of images that can be associated with an object, an object group, a site, an archaeological feature, operation, sub-operation, lot or sub-lot. |
| **A8.5** | **Tiling of images**<br>The proposed system should tile multiple images on the screen. | The Bidder must provide substantive evidence that the proposed system will tile multiple images on the screen. |
| **A8.6** | **Images stored in solution**<br>The proposed system should be capable of containing image files. | The Bidder must provide substantive evidence that the proposed system will be capable of containing image files. |
| **A8.7** | **Convert images**<br>The proposed system should allow images to be converted to multiple image file formats and resolutions. | The Bidder must provide substantive evidence that the proposed system will allow images to be converted to multiple image file formats and resolutions. |
| **A8.8** | **Image editing**<br>The proposed system should provide functionality for editing digital images (e.g. colour correct, rotate, resize, resample). | The Bidder must provide substantive evidence that the proposed system will provide functionality for editing digital images. |
| **Controlled vocabularies** | | |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **A9.1** | **List pre-built thesauri files**<br>The Vendor should list the pre-built thesauri files that are included in the proposed system. | The Vendor is to list the pre-built thesauri files that are included in the proposed system. |
| **A9.2** | **Thesauri for term expansion during retrieval**<br>Thesauri should be used during the retrieval process to expand a user's search to include synonyms and narrower terms (e.g. if a user searches for "Painting", the proposed system invokes the thesaurus to include narrower terms like "Watercolour"). | The Bidder must provide substantive evidence that the proposed system will allow the thesauri to be used during the retrieval process to expand a user's search to include synonyms and narrower terms. |
| **A9.3** | **Homonyms within thesaurus**<br>The proposed system should handle homonyms within the thesaurus and prompt users towards options (e.g. "drum" as a percussion instrument or as a container). | The Bidder must provide substantive evidence that the proposed system will handle homonyms within the thesaurus and prompt users towards options. |
| **Database indexing** | | |
| **A10.1** | **Change of index**<br>The proposed system should allow database administrators to change the index of any field. | The Bidder must provide substantive evidence that the proposed system will allow database administrators to change the index of any field. |

## 7.2 Additional Features

**Note:** If the Vendor is awarded points for any of the Additional Features during the Bid Evaluation, upon Contract award the Contracting Authority will amend the Contractual Obligations of Contractor's Bid Response section to reflect that these features will now form part of the Contract and the Contractor will be required to provide these features in accordance with and at the prices contained in Annex B – Basis of Payment.

Bidders should respond to the Additional Features Requirements using *Response Table 4 - Additional Functionality and Features.*

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **A11.1** | Additional General Functional Features | In order to receive additional feature points, the Bidder must name, describe and explain how each feature is of benefit to |
| **A12.1** | Additional Search Features | |

| NUM | Rated Requirement | Evaluation Grid for Bidder's Response |
|---|---|---|
| **A12.2** | Additional Reporting Features | Parks Canada. The Bidder must describe each feature in 250 words or less. |
| **A13.1** | Additional Collections Management Features | |
| **A14.1** | Additional Conservation/Conservation Science Features | |
| **A15.1** | Additional Archaeology Features | |
| **A16.1** | Additional Curatorial Features | |
| **A17.1** | Additional Site Information/Management Features | |
| **A18.1** | Additional Digital Asset Management Features | |
| **A19.1** | Additional Controlled Vocabulary Features | |

# 8 Initiation Phase Deliverables

The Initiation Phase will run from Contract Award until the start of the Project Phase. For the Initiation phase, the Vendor must provide the following documentation for Parks Canada approval. The plans listed below must be clear and concise.

Initiation Phase document drafts must accompany the initial bid. Documentation will be finalized with necessary input from Parks Canada team during the Initiation Phase. The initiation phase will be considered complete once all the documents have been approved.

Parks Canada will require 10 working days to review the proposed plans and return comments to the Vendor.

Note: The information or documents required for the Initiation Phase can be combined in one document, they are not required to be separate documents but all plans must be included. The plans do not need to be elaborate but they do need to be clear and concise.

| # | Milestone/Deliverable | Description/Reference |
|---|---|---|
| 2.1.1.1 | Initiation Phase start | At contract award |
| 2.1.1.2 | Project kick off meeting | TBD |

| | | |
|---|---|---|
| 2.1.1.3 | Project Management Plan | Document describing how the project will be managed from the Vendor's perspective. See *9.1 Core System Provider Project Management Plan.* |
| 2.1.1.4 | Project Plan (WBS) | The project plan should be at a high level, it does need to include milestones and timelines but does not need to include resource allocation. See *9.2 Project Plan.* |
| 2.1.1.5 | Communication Plan | The Vendor must agree to the Communication Plan put forward in this document but may make recommendation based on their experience. See *9.4 Communication Plan.* |
| 2.1.1.6 | Risk Management Plan | The Vendor must identify the risks to the project and recommend mitigation actions. See *9.8 Risk Management Plan.* |

# 9 Project Phase Deliverables

This section describes the key requirements and deliverables for the Vendor during the Project Phase of the Contract.

The requirements and deliverables described in this section are key items that the Vendor must complete regardless of the project management approach used. It is expected that there will be additional deliverables during the project phase that will be mutually agreed upon between the Parks Canada Project Authority and the Vendor at the onset of the Project Phase.

The Project Phase must include all tasks that the Vendor must complete to ensure that the proposed system meets all requirements described in all sections of the SoW, its annexes and appendices and ensure the system launches into Production successfully. The Vendor must deliver all requirements at the dates specified in the Schedule of Deliverables.

For each of the items that are required to be submitted to the Parks Canada Project Authority for approval, a minimum of 14 business days must be allocated between submission of a document and its approval. Parks Canada reserves the right to extend this time frame if multiple documents are delivered within a short period of time.

Acceptance of deliverables is at the discretion of the Parks Canada Project Authority. Generally, deliverables will be accepted if the deliverable:

A. Is complete and meets all acceptance criteria;
B. Addresses all requirements for that deliverable identified in this SoW;
C. Enables Parks Canada to have a sufficient understanding of the subject matter; and
D. Provides Parks Canada the ability to make informed decisions based on the supplied information.

The Government of Canada acknowledges that the Vendor will require information from Parks Canada to enable them to complete their work during the Project Phase in a timely manner. Parks Canada will

provide responses to the Vendor's questions or requests for information within 5 business days of being requested, or will provide a definitive answer as to when the desired information can be expected.

The key milestones within the Project Phase are indicated in the following table:

| # | Milestone/Deliverable | |
|---|---|---|
| 1 | Project Phase Start | Dependent on close of Initiation Phase |
| 2 | Project baseline | To be supplied by Vendor within 30 days of Project Phase Start. |
| 3 | Parks Canada specific configuration | Date to be supplied by Vendor. |
| 4 | Custom development | Date to be supplied by Vendor. |
| 5 | Unit and Integration Testing as required | Date to be supplied by Vendor. |
| 6 | Training for UAT | Date to be supplied by Vendor. |
| 7 | Preliminary Design Review (PDR) | Date to be supplied by Vendor. |
| 8 | System Acceptance Testing | Date to be supplied by Vendor. |
| 9 | Preliminary User Testing Start | Date to be supplied by Vendor. |
| 10 | Pilot | Date to be supplied by Vendor. |
| 11 | User Acceptance Testing | Date to be supplied by Vendor. |
| 12 | Improvement Phase | Date to be supplied by Vendor. |
| 13 | Critical Design Review (CDR) | Date to be supplied by Vendor. |
| 14 | Final System Acceptance Testing | Date to be supplied by Vendor. |
| 15 | Final User Acceptance Testing | Date to be supplied by Vendor. |
| 16 | Documentation - Reference and training materials. | Date to be supplied by Vendor. |
| 17 | User training delivered | Date to be supplied by Vendor. |
| 18 | Stabilization | Date to be supplied by Vendor. |
| 19 | Production launch | Latest possible date: March 15, 2017. |
| 20 | Transition | March 15, 2017 to March 30, 2017. |
| 21 | Implementation complete | Latest possible date: March 31, 2017. |

## 9.1 Core System Provider Project Management Plan

The Vendor must submit and maintain a Project Management Plan that identifies the working relationships between the Core System providers involved in the Contract.

A preliminary Project Management Plan must be delivered with the Vendor's Proposal. A final Project Management Plan should be delivered to the Parks Canada Project Authority within 30 calendar days of Contract Award.

The Project Management Plan must be kept current and approved and dated by Parks Canada. The Parks Canada Project Authority must approve any changes.

## 9.2 Project Plan

The Vendor's Project Manager must be responsible for creating and updating the Project Plan throughout the entire life cycle of the project from its Planning Phase to its Final Implementation.

A preliminary Project Plan including Work Breakdown Structure (WBS) must be delivered with the Vendor's Proposal. A final Project Plan should be delivered to the Parks Canada Project Authority within 30 calendar days of Contract Award. The Project Plan must clearly identify activities and milestones and must adhere to industry best practices. The Vendor may use whatever electronic tools their organization regularly works with such as Microsoft Project, OpenProj, or any equivalent. However, Parks Canada must approve the electronic tool chosen for compatibility reasons.

The Vendor must ensure that all key work items, deliverables, and activities (including internal Vendor activities) as well as associated dependencies are included in the Project Plan.

The Project Plan must detail and explain the Work Products, the Task Items and Milestones that make up the Project Schedule. This must include but is not limited to a list of Parks Canada Deliverables and their Planned Completion Date.

A project baseline must be established and modifications to the Project Plan and Project Schedule must be made as needed. The Vendor's Project Manager must inform Parks Canada of the reasons for the changes. Changes to the plan or schedule are subject to approval by Parks Canada's Project Authority.

## 9.3 Named Project Resources and Resource Plan

The Vendor's Project Manager must create a Resource Plan based on the Project Methodology being used ex. agile or waterfall approach or a blended hybrid of them. Note: all Vendor personnel who will have access to the Parks Canada network will require a valid Government of Canada Security Clearance at the Reliability Level or above depending on role.

### 9.3.1 Vendor Named Project Resources

The Vendor must provide the following key project team members from the project onset. This section identifies these key personnel who must be assigned to the project.

**Executive Authority (EA)**

The Vendor must designate and provide an Executive Authority (EA) who is the person to whom Parks Canada can escalate any project issues and concerns should the Vendor Project Manager be unable to resolve them. The EA may hold the pen to any contractual agreements and issues. The EA must be in

continuous contact with the Parks Canada Project Authority throughout the Project Phase to ensure overall satisfaction.

The EA must be able to fluently read, write and speak in English.

The EA assigned must be Parks Canada's main point of contact throughout the life of the Contract period.

**Vendor Project Manager (PM)**

The Vendor must designate and provide a Project Manager (PM) who has overall responsibility to PCA. The PM is responsible for the day-to-day communications with Parks Canada such as coordinating the activities of the development, testing, installation and implementation team as well as accomplishing the scope of work within the contract budget and project schedule. He/she is responsible for providing weekly status reports, risk mitigation and problem resolution.

The PM must have demonstrable experience administering project management services for the Product; or at least 5 years' of demonstrable experience administering project management services with an I.T. focused system of a similar product.

The PM must be able to fluently read, write and speak in English.

The PM must be available to meet with Parks Canada Core Project Team weekly during all stages of the project. The PM must also be available for face to face meetings when and as required.

The PM must be assigned to this project during the Production Launch including 30 calendar days Post Implementation to assure Parks Canada that a resource with full project history will remain available to assist in problem solving, if needed.

**Vendor Technical Lead (Tech Lead)**

The Vendor must designate and provide a Technical Lead (Tech Lead) who has overall responsibility to advise the Vendor's Project Team and Parks Canada Team on key technical issues and considerations such as but not limited to 3rd party or external System integration with the Vendor's System. The Tech Lead is responsible for providing recommendations on industry technical trends and best practices; and must have a thorough technical knowledge of the Vendor's product(s) to ensure that the best technical System with the most flexibility for future enhancement is obtained.

The Technical Lead must have at least 2 years of demonstrated experience with the Core Cultural Resource Management Product.

The Technical Lead must have demonstrated experience with Systems development.

The Technical Lead must be able to fluently read, write and speak in English.

The Technical Lead must be available to meet with Parks Canada Core Project Team weekly during all stages of the project. The Technical Lead must also be available for face to face meetings when and as required.

The Tech Lead must be assigned during the Production Launch including 30 calendar days Post Implementation to assure Parks Canada that a resource with full project history will remain available to assist in problem solving, if needed.

### 9.3.2 Additional Project Resources

The Vendor must provide per diem costs for each of the categories below. These categories and costs will be used for task authorization based work if required.

All position which may interact with Parks Canada personnel must be able to fluently read, write and speak in English.

| Category | Description/Criteria |
|---|---|
| **Project Manager** | See **Vendor Project Manager (PM)** above for details and qualifications |
| **Senior Database Administrator** | 7+ years' experience<br>**Responsibilities could include but are not limited to:**<br>• Customize database conversion routines.<br>• Finalize Conversion Strategy.<br>• Generate new database with the client.<br>• Maintain data dictionaries.<br>• Develop and implement procedures that will ensure the accuracy, completeness, and timeliness of data stored in the database.<br>• Develop and implement security procedures for the database, including access and user account management.<br>• Advise programmers, analysts, and users about the efficient use of data.<br>• Maintain configuration control of the database.<br>• Perform and/or coordinate updates to the database design.<br>• Control and coordinate changes to the database, including the deletion of records, changes to the existing records, and additions to the database.<br>• Develop and coordinate back-up, disaster recovery and virus protection procedures. |
| **Intermediate Database Administrator** | 3+ years' experience<br>Responsibilities could include but are not limited to:<br>**Responsibilities could include but are not limited to:**<br>• Customize database conversion routines.<br>• Finalize Conversion Strategy.<br>• Generate new database with the client.<br>• Maintain data dictionaries.<br>• Develop and implement procedures that will ensure the accuracy, completeness, and timeliness of data stored in the database.<br>• Develop and implement security procedures for the database, including access and user account management.<br>• Advise programmers, analysts, and users about the efficient use of data.<br>• Maintain configuration control of the database. |

| Category | Description/Criteria |
|---|---|
| | • Perform and/or coordinate updates to the database design.<br>• Control and coordinate changes to the database, including the deletion of records, changes to the existing records, and additions to the database.<br>• Develop and coordinate back-up, disaster recovery and virus protection procedures. |
| **Senior Developer** | 7+ years' experience<br>**Responsibilities could include but are not limited to:**<br>• Develop and prepare diagrammatic plans for solution of business, scientific and technical problems by means of computer systems of significant size and complexity.<br>• Analyze the problems outlined by the systems analysts/designers in terms of such factors as style and extent of information to be transferred to and from storage units, variety of items to be processed, extent of sorting, and format of final printed results.<br>• Select and incorporate available software programs.<br>• Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.<br>• Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.<br>• Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.<br>• Correct program errors by revising instructions or altering the sequence of operations.<br>• Test instructions, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference. |
| **Intermediate Developer** | 3+ years' experience<br>**Responsibilities could include but are not limited to:**<br>• Develop and prepare diagrammatic plans for solution of business, scientific and technical problems by means of computer systems of significant size and complexity.<br>• Analyze the problems outlined by the systems analysts/designers in terms of such factors as style and extent of information to be transferred to and from storage units, variety of items to be processed, extent of sorting, and format of final printed results.<br>• Select and incorporate available software programs. |

| Category | Description/Criteria |
|---|---|
| | • Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.<br>• Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.<br>• Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.<br>• Correct program errors by revising instructions or altering the sequence of operations.<br>• Test instructions, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference. |
| **Senior Data Conversion Specialist** | 7+ years' experience as a Data Conversion Specialist<br>**Responsibilities could include but are not limited to:**<br>• Customize database conversion routines.<br>• Finalize Conversion Strategy.<br>• Generate new database with the client.<br>• Maintain data dictionaries.<br>• Develop and implement procedures that will ensure the accuracy, completeness, and timeliness of data stored in the database.<br>• Develop and implement security procedures for the database, including access and user account management.<br>• Advise programmers, analysts, and users about the efficient use of data.<br>• Maintain configuration control of the database.<br>• Perform and/or coordinate updates to the database design.<br>• Control and coordinate changes to the database, including the deletion of records, changes to the existing records, and additions to the database.<br>• Develop and coordinate back-up, disaster recovery and virus protection procedures |
| **Intermediate Data Conversion Specialist** | 3+ years' experience as a Data Conversion Specialist<br>**Responsibilities could include but are not limited to:**<br>• Customize database conversion routines.<br>• Finalize Conversion Strategy.<br>• Generate new database with the client.<br>• Maintain data dictionaries.<br>• Develop and implement procedures that will ensure the accuracy, completeness, and timeliness of data stored in the database.<br>• Develop and implement security procedures for the database, including access and user account management. |

| Category | Description/Criteria |
|---|---|
| | • Advise programmers, analysts, and users about the efficient use of data.<br>• Maintain configuration control of the database.<br>• Perform and/or coordinate updates to the database design.<br>• Control and coordinate changes to the database, including the deletion of records, changes to the existing records, and additions to the database.<br>• Develop and coordinate back-up, disaster recovery and virus protection procedures |
| **Business Analyst** | 5+ years' experience as an IT Business Analyst<br>**Responsibilities could include but are not limited to:**<br>• Develop and document statements of requirements for considered alternatives.<br>• Perform business analyses of functional requirements to identify information, procedures, and decision flows.<br>• Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems.<br>• Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems.<br>• Establish acceptance test criteria with client.<br>• Support and use the selected departmental methodologies. |
| **Technical Writer** | 3+ years' experience as an Technical Writer<br>**Responsibilities could include but are not limited to:**<br>• Document help text, user manuals, technical documentation, web page content, etc.<br>• Review documentation standards and the existing project documentation.<br>• Determine documentation requirements and makes plans for meeting them.<br>• Gather information concerning the features and functions provided by the developers.<br>• Assess the audience for the documents/manuals which are required and prepare a statement of purpose and scope for each.<br>• Develop a table of content for each document/manual and write or edit the required content.<br>• Investigate the accuracy of the information collected by making direct use of the material being documented.<br>• Prepare or coordinate the preparation of any required illustrations and diagrams.<br>• Design the layout of the documents/manuals. |

| Category | Description/Criteria |
|---|---|
| | • Use word-processing, desk-top publishing and graphics software packages to produce final camera-ready copy. |
| **Trainer/Instructor** | 3+ years' experience as an IT Trainer for the Vendor's proposed solution<br><br>Responsibilities could include but are not limited to:<br><br>• Assess the relevant characteristics of a target audience.<br>• Prepare end-users for implementation of courseware materials.<br>• Conduct training courses.<br>• Communicate effectively by visual, oral, and written form with individuals, small groups, and in front of large audiences. |

## 9.4 Communication Plan

The Vendor's Project Manager must create a Communication Plan which must be followed. Parks Canada has outlined the following Status items which must be part of the Vendor's Communication Plan:

A. Weekly Project Status Reports ;
B. Status Meetings ; and,
C. Other Areas of Communication

The Communication Plan must be provided in electronic format to the Parks Canada Project Authority within 30 calendar days of Contract Award.

**A. Weekly Project Status Reports**

The Vendor must provide weekly Project Status Reports which must be e-mailed to Parks Canada's Core Project Team by end of day on the 1st working day of each week during the project's life cycle.

The weekly status reports must contain:

- Completed tasks since the previous Status Report;
- Upcoming tasks or sub-tasks awaiting information from Parks Canada such as but not limited to specific requirements, business direction, data or decisions ;
- Any tasks that are falling behind schedule, the reason(s) why, and the steps being taken to bring that task back on schedule;
- Any Vendor project team resource unavailability due to vacation, training or departure. Parks Canada will provide the same information for its Core Project Team members;
- All pending issues or new risks as well as the source of the problem and its impact on the Project; and
- Risk Summary

**B. Status Meetings**

The Project Manager must take part in status meetings as required during the project's life cycle. The anticipated attendees for this meeting include the Core Parks Canada Project Team members and the Core Vendor Project Team members. It is expected that most of these meetings will occur via teleconference.

**C. Other Areas of Communication**

In addition, the Vendor PM may also be called upon to provide input into Parks Canada's internal communication that may be developed for internal business units. For these communications, the Vendor PM will serve as a subject matter expert providing information with no deliverables based on these conversations.

## 9.5 Change Management Process

Parks Canada understands that in a project of this nature changes to the defined scope might be requested by either party during the project life cycle. Parks Canada wants to ensure that change requests are managed effectively by setting up a defined Change/Configuration Management Process.

The Parks Canada Project Authority may, by giving notice to the Vendor, at any time, request changes in the Work described in the Contract or in any approved Task Authorization(s). Conversely, the Vendor may wish to propose a change to the Work described in the Contract or changes to any approved Task Authorization(s).

Where Parks Canada requests a change or modification, Parks Canada will provide a written Change Proposal to the Vendor. Where the Vendor wishes to propose a change or a modification, the Vendor will submit a written Change Proposal to the Project Authority for consideration.

Within 5 working days of receipt of the request or in a time frame as agreed in writing with the Project Authority, the Vendor must either:

a) give notice to the Project Authority that the proposed modification is not sufficiently defined; or
b) submit to the Project Authority a completed Change Proposal which must contain the following:
    i) a description of the change(s);
    ii) the decrease or increase, if any, which the proposed change will cause to the Contract or Task Authorization price;
    iii) change(s) in delivery dates, if any, for any part of the Work affected by the directed or proposed changes;
    iv) the anticipated effect of the change(s) on the performance of the Work;
    v) the plan or plans to minimize the effect of the change(s) on the performance of the Work;
    vi) recommended plan or plans for the completion of the Work;
    vii) the work effort by role to accomplish the change(s)
    viii) any other change in the provisions of the Task Authorization or this Contract; and
    ix) additional information as may be reasonably required by the Project Authority.

Within 5 working days of receipt of the request or in a time frame as agreed in writing with the Project Authority, Parks Canada must either:

a) Give Notice to the Project Authority that the proposed modification is not sufficiently defined; or
b) submit to the Project Authority a completed Change Proposal which must contain the following:
    i) a description of the change(s);
    ii) the anticipated effect of the change(s) on the performance of the Work;
    iii) any other change in the provisions of the Task Authorization or this Contract; and
    iv) additional information as may be reasonably required by the Project Authority.

The Parks Canada Core Project Team will facilitate the Change Management Process by providing a forum for the joint review of selected changes proposals. Changes will be reviewed by, at a minimum, the Parks Canada Core Project Team and the Vendor's chosen representative.

## 9.6 System and Technical Architectures

The Vendor must develop and provide the System and Technical Architectures for the proposed system.

The System and Technical Architectures must be provided in electronic format to the Parks Canada Project Authority within 60 calendar days of Contract Award.

The System and Technical Architectures must clearly indicate how all of the Security and Privacy Requirements and the Technical Requirements will be met.

The System Architecture must include the following information:

i. A diagram showing how all of the software products, technology and interfaces relate and interact;
ii. A list of all middleware and application layer software that makes up the system. For each piece of software on the list, the following information must be provided: Name, brief description of functionality, manufacturer/supplier, and version. Ensure that the 'Core Product' is clearly identified;
iii. A list of ports and protocols required with justification; and,
iv. A list of all interfaces available to enable integration with 3rd party software and services. For each interface on the list, the following information must be provided: Name, brief description, applicable standards, and version.

## 9.7 Data Conversion Plan

The Vendor must utilize its data conversion tools and methodology to perform data conversions for a limited sub-set of Parks Canada's existing data for testing.

Parks Canada will provide a data migration specialist to work with the Vendor in order to supply the sample data for testing.

The Vendor must provide all tables and field mapping, conversion, and import routines to the Parks Canada Project Team for verification and validation review. The Vendor is responsible for data conversion of the agreed-to sample.

## 9.8 Risk Management Plan

The Vendor's assigned Project Manager (PM) must create the Risk Management Plan and update it throughout the entire life cycle of the Project from the Planning Phase to the final full Implementation of the system. The PM must lead the combined Project Team to identify, manage, and address issues that arise throughout the course of the system's Implementation. The PM must identify and provide immediate notice of all issues that may threaten the Implementation, Operation or Performance of the system.

The Risk Management Plan must include risk assessment, project and organizational impact and mitigating actions. A Risk Summary must be included within the weekly written Status Report.

The Risk Management Plan must be provided in electronic format to the Parks Canada Project Authority within 30 calendar days of Contract Award.

## 9.9 Test Strategy Document

The Vendor must develop and provide a Test Strategy Document to Parks Canada. The Test Strategy Document must include the following information:

A. A description of how the Vendor tracks Bugs or Defects ;
B. A list of Testing tools utilized;
C. A description of how the Vendor performs their unit and integration testing before the system is given to the Parks Canada Project Team to perform User Acceptance Testing;
D. Information on the method used to execute the test cases including information on the use of any automated tools;
E. A description of how the Vendor handles volume or performance testing to ensure the system can handle the anticipated number of concurrent users;
F. A description of the Quality Assurance Procedures that will be in place throughout the project to ensure that the system complies with the specifications and requirements described in this SoW.

In addition the Test Strategy Document must include a description of the Vendor's approach towards supporting Parks Canada during the UAT, Pilot and Improvement processes. This must include but is not limited to:

A. Review the Parks Canada produced User Acceptance Test Plan and Test Cases and providing input to maximize overall success;
B. Ensure the system contains the necessary Test Data;
C. Sample Test Scripts, if available;
D. Plan for maintaining Test Data; and
E. Train the Parks Core Project Team on the Vendor's defect tracking system to log defects, assign a severity, assign to the Vendor, and close an item on completion.

The Test Strategy Document must be provided in electronic format to the Parks Canada Project Authority within 90 calendar days of Contract Award.

## 9.10 Test Plan

The Vendor must develop, provide and execute a Test Plan approved by Parks Canada. The Test Plan must describe the proposed approach taken with each stage of the test, the processes involved, the testing result, and the plan to address issues encountered.

The Vendor's Test Plan must be available to Parks Canada for review and to use as a basis to define the Parks Canada Test Plan.

The Test Plan should be provided in electronic format to the Parks Canada Project Authority within 90 calendar days of Contract Award and approved by Parks Canada.

## 9.11 Test Cases

The Test Cases used by the Vendor must be updated to include the Parks Canada-specific System requirements including any customized features and functionality.

The Test Cases must be available to Parks Canada for review and to use as a basis to define the Parks Canada S/UA Test Cases.

The Test Cases should be provided in electronic format to the Parks Canada Project Authority at least 30 calendar days prior to SAT Start.

## 9.12 Parks Canada System and User Acceptance Testing (S/UAT)

Parks Canada has a defined approach it will undertake during the System Acceptance Testing and User Acceptance Testing Phases.

The full system should be delivered for end to end S/UAT no later than 120 days prior to Production Launch.

Parks Canada will name an S/UAT Coordinator from the core Project Team to organize and oversee all aspects of the SAT and UAT. Specific users will be selected to participate in the System Acceptance Testing and the User Acceptance testing along with key Project Team members very familiar with the Business Requirements and System Deliverables. The selected Parks Canada Users will represent the range of disciplines.

The staff will execute test cases developed from the Business Requirements, as well as routine transactions and challenging scenarios they regularly face or that have proved problematic to the current cultural resource management systems. Core Project Team members will supplement this testing with the back-office or administration features outlined in the Feature List.

The S/UAT Team will run through their test cases and if they deem something to be a bug/issue, they will log it with the Parks Canada S/UAT Coordinator. The Parks Canada S/UAT Coordinator will review each item and determine if the item logged is a defect.

The Core Parks Canada Team will review all bugs and issues reported to determine how it should be handled:

A. System functionality that does not meet requirements as outlined in the SoW will be logged by the Parks Canada S/UAT Coordinator as a defect.
B. A misunderstanding on the part of the Pilot testers when an item is working as defined within the SoW will be communicated back to the testing team by the Parks Canada S/UAT Coordinator and the item will be closed.

Within the S/UA testing phase, the Vendor must establish a “triage” team consisting of representatives from the Vendor's Project Team; as well as the Parks Canada Core Project Team.

During the S/UAT phases, this Triage Team must meet as required to review and discuss the new defects and collectively assign a Severity level detailed below which will act as a method of prioritizing the defect work to be completed.

The Severity levels are outlined as follows:

| SEVERITY CLASSIFICATION | DEFINITION | PRIORITY / EXPECT RESYSTEM TIMEFRAME |
|---|---|---|
| Critical | System does not work or a transaction cannot be completed due to a System crash or the like, preventing further testing to be completed. | Priority 1 – Must be corrected immediately. Will not “Go Live”. |

| SEVERITY CLASSIFICATION | DEFINITION | PRIORITY / EXPECT RESYSTEM TIMEFRAME |
|---|---|---|
| High | System does allow for a transaction to be completed but the result is incorrect; or a specific sub-component of the system is not available for testing. | Priority 1 – Must be corrected prior to “Go Live”. |
| Medium | System does allow for a transaction to be completed but the result is incorrect. | Priority 2 – Must be corrected prior to “Go Live”. |
| Low | A minor issue with the system such as a wrong coloured graphic or misaligned textbox on an input screen. | Priority 3 – may or may not be corrected before “Go Live” based on mutual agreement between Parks Canada Project Team and the Vendor. |

All Critical, High and Medium bugs must be resolved before Parks Canada will sign off on release of the system to Production.

Defects classified as Low will be discussed with the Vendor and each defect will be assessed for its impact and a determination will be made as to whether the defect needs to be corrected before the system can be released to Production.

## 9.13 Post-UAT List of Defects and Issues

A plan for addressing all remaining defects must be developed by the Vendor and approved by the Parks Canada Project Authority. The Vendor must create a Post-UAT List and provide it to the Parks Canada Project Authority within 14 calendar days of completion of the Parks Canada User Acceptance Testing phase. Within this document the Vendor must list the remaining defects and issues and the Vendor’s expected implementation date and approach to resolve every item on the list.

Parks Canada may sign off on UAT to allow the system to be released to Production with the condition that all outstanding defects must be addressed as per the agreed upon plan. Parks Canada’s act of signing off on UAT is only intended to indicate that the current state of the system is of high enough quality to proceed into a Production environment and does not absolve the Vendor of the responsibility of correcting the remaining defects and issues.

## 9.14 Acceptance Criteria

Parks Canada has a defined approach it will undertake during the User Acceptance Testing Phase.

| Item | Name | Description |
|---|---|---|
| | Stabilization launch | Application in production to limited users and stable |
| | Documentation | All documentation complete and delivered |
| | Training | All training complete and delivered |
| | System Acceptance Testing | SAT complete and acceptable |

| | | |
|---|---|---|
| | User Acceptance Testing | UAT complete and acceptable |
| | Issues | All issues resolved to acceptable level |
| | Risks | All risks sufficiently mitigated |

# 10 Implementation and Deployment Plan

Parks Canada requires that the Vendor develop and provide an Implementation and Deployment Plan as a supplement to the overall Project Plan. The Implementation and Deployment Plan must outline the required tasks, estimated hours, responsibility, major deliverables and timing to fully implement the proposed system into Production. At a minimum, the Implementation and Deployment Plan must cover the following areas:

A. Implementation approach;
B. Vendor's Methodology including Site Preparation, Roll-out Strategy, System Phasing and other related System Deployment Requirements;
C. Backup and Recovery Strategy; and
D. Pre and Post "Go live" Support. The Vendor is responsible for all Pre "Go live" issues discovered during the Final Acceptance Testing on the Vendor's Production Environment, Conversion, Post "Go live" Issues and Communications during the weeks leading up to and weeks and months Post "Go live". The Vendor must describe the resources approach, and plans that will be used to assist Parks Canada during this critical time in the Project.

## 10.1 Data Models and Data Structures

The Vendor must provide documentation on the System's data structures and/or data models that include Parks Canada-specific data elements. The documentation must include any data models and associated data dictionaries that describe all data structures used in the System.

A draft version must be provided in electronic format prior to User Acceptance Testing. The final version must be provided in electronic format prior to Production launch.

## 10.2 Project Phase Lessons Learned

The Vendor must provide input on Lessons Learned to the Parks Canada Project Authority. The Lessons Learned document is a Parks Canada deliverable but the Vendor must also provide requested feedback on their team's interactions during the project phase that would help Parks Canada improve the process for subsequent similar projects.

The Lessons Learned Input must be provided in electronic format to the Parks Canada Project Authority within 30 calendar days of Production launch.

## 10.3 Acceptance Criteria

Parks Canada has a defined approach it will undertake during the User Acceptance Testing Phase.

| Item | Name | Description |
|---|---|---|
| | Issues | All issues resolved to acceptable level |
| | Risks | All risks sufficiently mitigated |
| | Lessons learned | Lessons learned received from Vendor |
| | Production launch | Application in production and stable |
| | Transition complete | No outstanding issues |

## 10.4 Transition Services after User Acceptance Testing

The period for transition services will start 90 days prior to the end of the contract and continue for 60 days after the end of the Contract.

### 10.4.1 Transition Plan

The Vendor must provide the first version of the Transition plan to the Project Authority 60 days before the completion of the contract.

The Transition Plan must incorporate appropriate items captured in the Project Phase Lessons Learned Report. The plan must list all activities, deliverables, dependencies, milestone dates, and level of effort, assumptions and the identification of critical dependencies.

The Transition Plan must address, at a minimum, but not limited to the following:

a. Transition-out strategy;
b. Project Management;
c. Business change management support;
d. Data models.

The Transition Plan is considered part of the Improvement Phase deliverables as indicated in Schedule of Deliverables and must be delivered as part of the Improvement Phase as per Annex B – Basis of Payment.

## 10.5 Contacts

### 10.5.1 Vendor

The Vendor must provide Parks Canada with the names, titles, office phone, cell phone and e-mail addresses for at least 2 people to whom critical issues can be raised at any time.

### 10.5.2 Parks Canada

Parks Canada will provide the Vendor with the list of approved Parks Canada Staff who may communicate issues to the Vendor. This list will be updated as required and provided to the Vendor.

# 11 Optional Services

## 11.1 Task Authorization

Additional work to the proposed system may be undertaken during the course of the Contract period. Parks Canada will create a Task Authorization form and provide the task scope to the Vendor who will supply the amount of work per resource category to be completed at the rates outlined within Annex B – Basis of Payment. Based on the returned project estimate, Parks Canada will decide whether to proceed with the work described within the Task Authorization.

The Vendor may be required to perform additional work within the scope of this contract on an "as and when required" basis through Task Authorizations. There is no guaranteed additional work for the Vendor other than what is stipulated within the Fixed Price Project Phase and the Improvement Phase Transaction fees.

# 12 Schedule of Deliverables

This document provides a summary of the deliverables for reference by the Vendor and the Parks Canada Project Authority. The Table below indicates which deliverables are associated with the milestones listed in Annex B – Basis of Payment.

Notes:

1. All days are calendar days.
2. Due Dates are for final documents. The Vendor should plan delivery of draft documents accordingly.
3. The Parks Canada Project Authority may at their discretion add, remove or change any of these deliverables. The final list of deliverables will be provided to the Bidder within 30 days of Contract Award.

| Name | Reference | Due Date | Associated Milestone |
|---|---|---|---|
| Project initiation draft document(s) | As described within section *2.1.1* Initiation Phase | To accompany bid | 1 |
| Project initiation document(s) ready for approval | As described within section *2.1.1 Initiation* Phase | Within 30 days of contract award | 1 |
| Documentation approved by Parks Canada | As described within section *2.1.1* Initiation Phase | Within 10 days of document received from Vendor | 1 |

| Name | Reference | Due Date | Associated Milestone |
|---|---|---|---|
| System and Technical Architectures | As described within section *9.6 System and Technical Architectures* | No later than 60 days after Contract Award. | 2 |
| Test Strategy document | As described within section *9.9 Test Strategy Document* | No later than 90 days after Contract Award. | 2 |
| Test Plan | As described within section *9.10 Test Plan* | No later than 90 days after Contract Award. | 2 |
| Final Test Cases<br><br>Updated versions that will be used to enable Parks Canada to develop UAT Plan. | As described within section *9.11 Test Cases* | No later than 30 days prior to Pilot/UA Testing Start | 3 |
| Implementation and Deployment Plan | As described within section *10 Implementation and Deployment Plan* | No later than 120 days prior to Production Launch | 3 |
| Training Plan for Initial Launch | As described within section 6 Parks Canada Training Requirements *6 Parks Canada Training* Requirements. | No later than 120 days prior to Production Launch | 3 |
| Preliminary Training Material | As described within section 6 Parks Canada Training Requirements *6 Parks Canada Training* Requirements. | No later than 120 days prior to Production Launch | 3 |

| Name | Reference | Due Date | Associated Milestone |
|---|---|---|---|
| Data Model and Data Structure Documentation | As described in section *10.1 Data Models and Data Structures* | Prior to scheduled commencement of UA testing | 3 |
| Configuration complete | All configurable items in Statement of Work Completed | Prior to scheduled commencement of UA testing | 4 |
| Customization complete | All authorized customization completed. | Prior to scheduled commencement of UA testing | 4 |
| Full system delivered for end to end UAT and Pre UAT Solution Demonstration Completed | As described within section *9.12 Parks Canada System and User Acceptance Testing (S/UAT)* | No later than September 2016 | 4 |
| Parks Canada conducted UAT Testing and sign off on identified Functionality and established a post-UAT list of remaining work/items | As described within section *9.12 Parks Canada System and User Acceptance Testing (S/UAT)* | No later than January 2017 | 4 |
| Post-UAT List of Outstanding Defects/Issues. | As described within section *9.13 Post-UAT List of Defects and Issues* | No later than 14 days after UA Testing is completed. | 4 |
| Production Launch | As described within the project deliverables | No later than February 2017 | 5 |
| Vendor's Input to Lessons Learned Report | As described within the *10.2 Project Phase Lessons Learned* | TBD | 5 |
| Final Data Model and Data Structure Documentation | As described in section *10.1 Data Models and Data Structures* | TBD | 5 |
| Train-the-Trainer training sessions conducted | As described within section *6.2 "Train-the-Trainer"* | No later than March 2017 | 6 |

| Name | Reference | Due Date | Associated Milestone |
|---|---|---|---|
| Successful Completion of Launch Period | As described within section *9 Project Phase Deliverables* | No later than March 31, 2017 | 7 |
| Initial Transition Out Plan | As described within section *10.4.1 Transition* Plan | TBD | 8 |
| Revised Transition Out Plan | As described within section *10.4.1 Transition* Plan | TBD | 9 |
| Project Close | As described within section *10.3 Acceptance Criteria* | TBD | 10 |

## 12.1 Contractual Obligations of Bidder's Response

In addition to any other obligations contained in the resulting contract, upon Contract Award the Government of Canada will incorporate the Additional Functionalities or Features for which the successful Bidder was awarded technical points in Response Table 4 - Additional Functionality and Features.

# Appendix 1 – Glossary of Terms

| TERM | DEFINITION |
|---|---|
| Accession | The procedure of recording the addition of a historical or archaeological object into the Parks Canada Collection. |
| Acquisition | The procurement of a historic object or reproduction by Parks Canada through purchase, donation, bequest, transfer, commission, or manufacture. This term also applies to archaeological artifacts obtained from Parks Canada lands and to reproductions manufactured in-house by Parks Canada. |
| Authority Table | List of single distinct name for each item (i.e. in drop down list); unique nomenclature as part of classification system. |
| Bug | A software bug is an error, flaw, mistake, failure, or fault in a computer program or system that produces an incorrect or unexpected result, or causes it to behave in unintended ways. |
| Change Management | The Process responsible for controlling the Lifecycle of all Changes. The primary objective of Change Management is to enable beneficial Changes to be made, with minimum disruption and impact. Change Management also controls and manages the implementation of those changes that are subsequently given approval. |
| Classification System | The process of grouping together historic objects or reproductions by major category, and classification terms according to their original function as defined in *Canadian Parks Service: Classification System for Historical Collections.* |
| Configuration | Configuration refers to the way a solution (hardware or software) is set up. Any solution will require some level of configuration to deploy, that means putting operating systems and databases on it, determining different types of drop-down menus, and so on. But the underlying platform is pre-integrated with most of the capabilities needed to get started. What changes is the specific deployment configuration. |
| Configured component of the Solution | Requires no programming or code changes; it involves either setting a value or turning a feature on/off. |
| Conservation Sciences and Preventative Conservation | Conservation Sciences and Preventative Conservation provides specialized scientific analysis in support of object and artifact conservation; and provides advice and assistance regarding the long-term preventative conservation of objects and artifacts at sites and parks, including conservation surveys, monitoring and maintenance strategies. |
| Controlled Vocabulary | Form of knowledge organization systems.<br><br>A controlled vocabulary, also called an authority list, is an authoritative list of terms to be used in data entry. Controlled vocabularies are used to ensure consistent data.<br><br>Controlled vocabularies are often used for name authorities and locations. |
| Core Product | Refers to the core system provided as part of the Contract. |
| CRMIS | Cultural Resource Management Information System |

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| Cultural Resource | A human work, an object, or a place that is determined, on the basis of its heritage value, to be directly associated with an important aspect or aspects of human history and culture. Cultural resources associated with Parks Canada protected heritage places are divided into two categories: cultural resources of national historic significance and cultural resources of other heritage value. |
| Cultural Resource Management (CRM) | Cultural resource management includes accommodating changes to places and cultural resources, as the needs of protected heritage places evolve over time. |
| Customization | Customization refers to any added functionality to a product that is not included in the out-of-the-box installation of that product. It usually involves change to existing code or creation of new code. |
| Data Dictionary | A data dictionary is a collection of descriptions of the data objects or items in a data model for the benefit of programmers and others who need to refer to them. |
| Deaccession | The procedure of recording the removal of an accessioned historic object or archaeological artifact from the Parks Canada Collection.<br><br>The legal, permanent removal of an object, document, specimen, or collection from a repository. Requires full documentation of the process. |
| Defect | A defect is a deviation from the requirements |
| Digital asset | A digital asset is anything that is stored in a binary format. Digital assets are classified as images, multimedia and textual content files. |
| Disposal | The physical removal of a historical or archaeological object or reproduction from Parks Canada's ownership. |
| ESRI | aka Environmental Systems Research Institute, GIS Mapping Software |
| Field Unit | A Field Unit is a Parks Canada organizational unit responsible for the national parks, national historic sites and national Marine conservation areas within its boundaries. |
| Heritage Areas and Other Areas Administered by PCA (combine with Heritage Area) | Heritage Area: Federal Land administered by the Parks Canada Agency, that is: National Parks of Canada (including National Park Reserves of Canada); National Historic Sites of Canada administered by PCA (including historic canals); National Marine Conservation Areas of Canada (including Saguenay-St. Lawrence Marine Park); Any other federal lands administered by PCA (including Pingo Canadian Landmark, and submerged lands) |
| Issue | An issue is a unit of work to accomplish an improvement in a system. An issue could be a bug, a requested feature, task, missing documentation, and so forth. The word "issue" should not be misunderstood as just a synonym for "problem". |
| Lot (acquisition group/artifact assemblage) | For archaeological artifacts, *lot* refers to a group of artifacts identified by provenience, material, and/or object name. Provenience should be as specific as is recorded by the archeologist. Material may not be mixed, such as glass and ceramics. Object name may be used to separate out different types of objects of the same material from the same provenience (e.g., flakes, projectile points). For historic objects, *lot* refers to the entire group acquired at the same time. Object type may vary. |

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| | |
| National Historic Site | Place of national historic significance designated by the Government of Canada on the advice of the Historic Sites and Monuments Board of Canada (HSMBC). A national historic site is a place that has been designated by the Minister of the Environment on behalf of the federal government as being a place of national historic significance. The Historic Sites and Monuments Board of Canada (HSMBC) is appointed by the federal government to provide advice to the Minister concerning designation of sites. National Historic Site has both a formal and an applied meaning. The formal meaning refers to "historic place" as defined in the Historic Sites and Monuments Act or a place set aside as a national historic site under Section 42 of the Canada National Parks Act. The name is commonly used to refer to the area administered by Parks Canada, or another owners, as a national historic site. |
| National Marine Conservation Area | A designated marine area set aside in accordance with the National Marine Conservation Area Policy. |
| National Park | An area which has been identified as a natural area of Canadian significance, which has been acquired by Canada and designated by Parliament as a national park, and over which Parks Canada has been given administration and control under the authority of the National Parks Act. It is managed for the benefit, education and enjoyment of Canadians so as to leave it unimpaired for future generations. |
| Non-digital asset | A non-digital asset in essence is anything that is stored in a physical format. Non-digital assets are classified as physical images, maps and textual content documents such a printed reports and other printed reference materials |
| Parks Canada Archaeological Provenience System | National in scope, the Parks Canada Archaeological Provenience System is used to establish connections between archaeological specimens and records. It is an alpha numeric code used by all Parks archaeologists to represent the location in an excavation or surface collection from which a specimen was recovered or an observation was recorded. The resulting alpha numeric code is the **Parks Canada archaeological provenience number** which is applied to sites, artifacts, documentation, digital assets, features etc. connected to that particular location. |
| Parks Canada Collection | The collection of historic and archaeological objects that have been acquired by Parks Canada to support its mandate as outlined in the Parks Canada Scope of Collection Statement and that been accessioned into the collection. |
| Project Management Plan (PMP) | The PMP details how the project will be managed. It defines roles and responsibilities and usually incudes Organizational Breakdown Structure (OBS), Communications Plan, Change Management/Issue Management processes, etc. |
| Project Plan | Often referred to as the Work Breakdown Structure (WBS) and schedule. Includes deliverable definitions and dates, task items and milestones. |

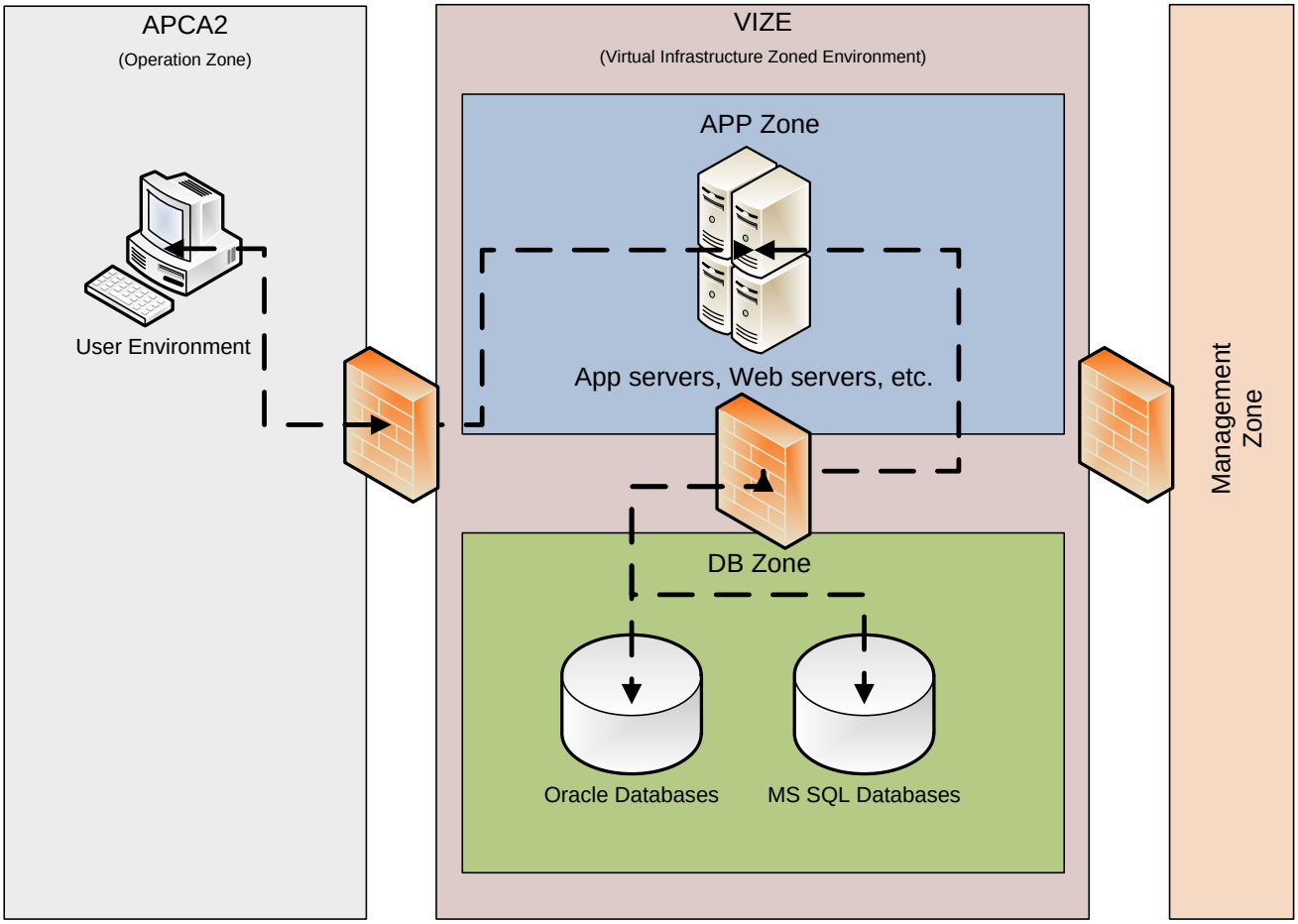
| | |
|---|---|
| Proposed System | Refers to the bundled Products/Systems combined together by a Vendor to meet the business needs of Parks Canada as outlined within this RFP. This would include the Vendor's core Cultural Resource management product along with other supporting systems owned by a particular Vendor or a partner. Term could be used inter-changeably with Solution Offering. |
| Provenance | The substantiated origin or history of ownership of a historic object.<br><br>The background and history of ownership for an object or records. Generally used for works of art, historic objects, and archival records. |
| Provenience | For archaeological artifacts, provenience refers to the location where the artifact was recovered.<br><br>For archaeological sites, provenience is the specific geographic or spatial location (either in two-dimensional or three-dimensional space) where cultural deposits including artifacts and features were noted or recovered. Site provenience includes the vertical and horizontal assignments of, Operation, Sub-Operation, Lot and Sub-lot. |
| Reference/Type Collection | A collection of items that represents a certain class of objects, usually demonstrating the typical or the range of variation. It may be compiled for the purpose of comparison in order to advance scholarly research. |
| Site information Management | Site information can include but is not limited to provenience, environmental, stratigraphic and geospatial/cartographic information. The proposed system must enable users to record site visits, recommendations and site condition assessments. Provenience information is based on the Parks Canada provenience system. |
| SPECTRUM | SPECTRUM is a UK-based guide to good practice for museum documentation, established in partnership with the museum community. It contains procedures for documenting objects and the processes they undergo, as well as identifying and describing the information which needs to be recorded to support the procedures. |
| Thesauri - Classification System | A thesaurus, as used in information science and literature retrieval, is a controlled vocabulary following a standard structure, where all terms in the thesaurus have relationships to each other. These relationships are typically of three kinds: hierarchical (broader term/narrower term), associative (see also), and equivalent (use/used from or see/seen from). |

# Appendix 2 – Parks Canada Technical Environment

Parks Canada is an organization with offices and service delivery locations from coast to coast to coast. We operate in many remote areas. Although we continually strive to ensure that all of our staff is well connected, this is not always possible. The Vendor is requested to carefully review the information in this section to ensure they understand the environment in which the proposed system must operate.

The proposed system shall be accessed from a variety of End User Computing Devices. This includes standard desktops and laptops.

## A2.1 General




Only the Application layer is accessible to the users and the DB layer is only accessible to the Application layer. With this environment configuration Client-Server applications will not work because a user/client pc cannot directly access any databases on the database servers.

The Parks Canada information systems environment consists of the following:

Server OS: Windows 2008r2

Web Server: IIS 7.5

Authentication: AD authentication to authenticate all of our users and provide single sign on.

Database: Database: Oracle 11g, Microsoft SQL Server 2008R2/2012

Programming languages/tools: ASP.Net, C#, C++, VB.Net, Visual Studio, PeopleSoft Version 8.9

## A2.2 End user computing devices

**Hardware:**

Desktops or Laptops with a minimum of:

- 1 Physical Processor, with 2+ Multi Core processors (virtual), >1GHz processor speeds
- 4+ GB RAM
- 120+ GB HDD

**Standard Installed Software:**

- OS: Windows 7 Enterprise SP1 x64
- McAfee Virus Scan 8.8
- McAfee Host Intrusion Protection 8.0
- Internet Explorer 9.0
- Microsoft Office Professional 2013
- Lotus Notes Client 8.5.2 FP4 (Moving to MS Exchange and Outlook 2013)
- Adobe Reader XI (currently @ v11.0.07)
- Adobe Flash Player ActiveX & Plugin (currently @ v14.0.0.145)
- BlackBerry Device Manager (currently @ v6.1.0.35)
- Citrix Online Plug-in (currently @ v12.3.0.8)
- Eminent Ware WMI Provider (v1.71.210.1)
- Entrust Entelligence Security Provider (currently @ v9.2)
- Dameware Mini Remote Control Agent (currently @ v10)
- Java (currently @ v7u51)
- Microsoft Silverlight (currently @ v5.1.20513.0)
- Quicklime (currently @ v7.71.80.42)
- Webex Client Agent (currently @ v2.32.1202.17045)
- Winzip (currently @ v17.0)

**Current Standard – Parks Canada specialty peripherals TBD**

For example:

a) bar code scanner
b) Label printer (eg. Thermal)

## A2.3 Network overview

Parks Canada's national network consists of over 200 LANs connected to a Wide Area Network via link speeds ranging from 56kps to T3, utilizing a single Windows 2003 Active Directory Domain.

There are approximately 4,500 workstations and laptops running Windows 7. In addition, there are approximately 200 multi-vendor Intel LAN servers spread across the country that provide local file, print and messaging services. Parks Canada also operates a national data centre and is in the process of moving applications to this location. All edge-of-network services are currently located in the data centre. The data centre is utilizing IBM hardware for servers, storage and backup. A variety of backup sub-systems are used with VERITAS BackupExec, Commvault and Netbackup as the backup software of choice. For its managed wide area network, Parks Canada uses Cisco routers as interconnecting network devices. The LANs consist of a variety of multi-vendor hubs and switches, including a limited number of 100Mb layer 3 switches, which at the moment account for about 30% of the devices.

Access to the Internet or external networks is through a firewall with stringent security configuration and all SMTP mail is scanned for viruses and unacceptable file attachments.