Request for Information - Elections Canada Contact Centres Project (EC3)

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Instructions

Please complete the survey questions for your solution.

- * indicates a mandatory field
- Please provide additional information if no response options are applicable to your proposed solution

General Company Information

1) *Company:

2) *Address:

3) *Respondent's Name

4) * Representative's Title

5) * Contact Phone

6) *Contact E-mail:

7) *High-level overview of your solution capable of meeting EC's requirement.

8) How many years has your company been in business?

9) How has your solution evolved? Over what period?

10) What are the generic services that you provide as a vendor? (question modified September 23, 2016)

11) Do you have technical literature available to share with EC? Check all that apply.

If yes, please send all your documentation as an attachment via email when submitting your RFI. Instructions on emailing your documentation can be found at the RFI front cover page.

☐ Standard operating document for your solution

☐ Technical literature for your solution

☐ Other (please specify): [_____]

General System Capabilities

12. What major functions does your solution include/provide? Please list the functions along with a brief description.

	Option	If Yes, Explain:
Knowledge Base	○ Yes ○ No	
Case Management (Workflow Management)	○ Yes ○ No	
Client Contact Information Management	○ Yes ○ No	
Workforce Management	○ Yes ○ No	
Contact Channel	○ Yes ○ No	
Self-Serve	○ Yes ○ No	
Analytics and Reporting	○ Yes ○ No	

	Option	If Yes, Explain:
Other (Please specify)	○ Yes ○ No	

13) Does the solution support telephony products to enable integration between your CMS solution and telephony products?

Option	○ Yes ○ No
If yes, which telephony product(s)?	
Briefly describe how this integration works (in technical and non-technical terms).	

14) Does the solution support fax products to enable integration between your CMS solution and fax products?

Option	○ Yes ○ No
If yes, which fax product(s)?	
Briefly describe how this integration works (in technical and non-technical terms).	

15) Does the solution support e-mail systems to enable integration between your CMS solution and e-mail systems?

Option	○ Yes ○ No
If yes, which email system(s)?	
Briefly describe how this integration works (in technical and non-technical terms).	

16) Does the solution support the merging of the following intake channels in order to create a case file from the initial interaction using that specific channel?

If Yes, briefly describe how this is accomplished (in technical and non-technical terms)

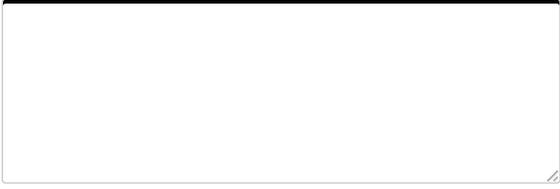|	Option	Brief Description
Uploaded Documents	⚪ Yes ⚪ No	
Inbound Fax	⚪ Yes ⚪ No	
E-mail	⚪ Yes ⚪ No	
Phone Transactions	⚪ Yes ⚪ No	
Web Forms	⚪ Yes ⚪ No	

17) Does the solution integrate with social media to link to cases and/or other record types?
If Yes, briefly describe how this is accomplished (in technical and non-technical terms)

	Option	Brief Description
Facebook	⚪ Yes ⚪ No	
Twitter	⚪ Yes ⚪ No	
Other (please specify):	⚪ Yes ⚪ No	

18) Does the solution support integration with document management systems?

If Yes, briefly describe how this is accomplished (in technical and non-technical terms)

	Option	Brief Description
GCDocs	○ Yes ○ No	
SharePoint	○ Yes ○ No	
Other (please specify):	○ Yes ○ No	
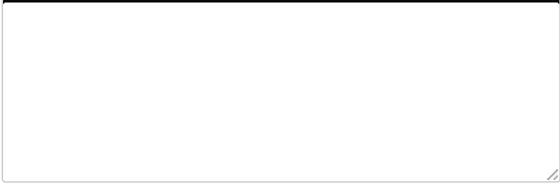
19) Does the solution have an integrated knowledge base?

Option   ○ Yes
○ No

If yes, please provide details (in technical and non-technical terms).

If no, what modules/add-ons integrate or are compatible with this product for the purpose of accessing knowledge stores along with the case management component?

20) Does the solution include an integrated business rules engine?

Option   ○ Yes
○ No

Briefly describe this function (in technical and non-technical terms).

21) Does the solution provide the means to capture and manage contact records?

Option   ○ Yes
○ No

Briefly describe this function (in technical

and non-technical terms).

22) Does the solution provide the means to link to cases and/or other record types?

For example, can a link be added to a web page that would generate a new case file in the solution when an end-user click on the link?

Option   ○ Yes

             ○ No

Briefly describe this function (in technical and non-technical terms).

23) Does the solution have an Identity Access Management (IAM) system built in?

Option   ○ Yes

             ○ No

Briefly describe this function (in technical and non-technical terms).

If yes, does the IAM product have an   ○ Yes

Application Programming Interface (API)   ○ No

that can be leveraged by third parties?

Briefly describe this function (in technical and non-technical terms).

24) Does the solution integrate with third party Identity Access Management (IAM)?

Option   ○ Yes

             ○ No

Briefly describe this function (in technical and non-technical terms)

25) Can you create unique data fields, out of the box, without coding?

Option   ○ Yes

             ○ No

a) If Yes, can the fields be re-used with   ○ Yes

multiple case-type?   ○ No

If Yes, briefly describe how this is

accomplished (in technical and non-technical terms

b) If Yes, are the fields still present after a software upgrade?
- ○ Yes
- ○ No

If Yes, briefly describe how this is accomplished (in technical and non-technical terms)

c) If Yes, can the fields be used for reporting?
- ○ Yes
- ○ No

If Yes, briefly describe how this is accomplished (in technical and non-technical terms)

26) Can the solution create and manage multiple case types?

Option
- ○ Yes
- ○ No

If Yes, briefly describe how this is accomplished (in technical and non-technical terms

a) If yes, does every case type have a unique workflow associated to it?
- ○ Yes
- ○ No

If Yes, briefly describe how this is accomplished (in technical and non-technical terms).

27) Can the solution create and manage multiple case sub-types?

Option
- ○ Yes
- ○ No

a) If yes, can the sub-case type inherit its parent's workflow?
- ○ Yes
- ○ No

If Yes, briefly describe how this is accomplished (in technical and non-technical terms).

b) If yes, can the sub-case type inherit its parent's unique data fields?
- ○ Yes
- ○ No

If Yes, briefly describe how this is accomplished (in technical and non-technical terms).

28) Is the solution scalable to handle significant increase in volumes of users (e.g., from 500 to 5000 users)?

Option

○ Yes

○ No

If Yes, briefly describe how your identify life-cycle management is implemented (in technical and non-technical terms)

29) Is the solution scalable to handle significant increase in volumes or case created, regardless of contact channel used to reach the CMS (e.g., from 10 thousand cases created per year to 1.5 million)?

Option

○ Yes

○ No

If Yes, briefly describe how this is accomplished (in technical and non-technical terms).

30) Does your solution provide the ability to have a flexible licensing agreement, to allow for a monthly increase or decrease in number of licences, on top of the base licensing done on annual basis (e.g. Annual licensing is at 500 users. Acquire 4500 more licenses for a 3 month period, for a total of 5000.)

Option

○ Yes

○ No

If Yes, briefly describe how this is accomplished (in technical and non-technical terms).

Are you open to adopting a pro-rated pricing model for licenses used for only a few months?

○ Yes

○ No

Comments:

What is the time frame required to add or remove licenses?

Select best choice: ▼

Comments:

31) What is the maximum number of concurrent users that your solution can handle?

Please enter the maximum amount of
concurrent users:

Please describe how this is accomplished
(in technical and non-technical terms).

32) Can the solution provide the ability to create and generate reusable basic and custom reports?

Option   ◯ Yes   ◯ No

Briefly describe how this is accomplished
(in technical and non-technical terms).

33) Can the solution provide access to the data so that other systems / tools (e.g., Business Intelligence (BI) and Business Analytics (BA)) can pull data from it to produce custom reports?

Option   ◯ Yes
                                    ◯ No

If so, briefly describe how this
integration between the BI/BA tools and
the CMS is accomplished (in technical
and non-technical terms).

If so, can the solution be implemented   ◯ Yes
without slowing or changing the end user   ◯ No
experience/functionality of the
application?

If so, briefly describe how this integration
between the BI/BA tools and the CMS is
accomplished (in technical and non-
technical terms).

34) Is the documentation for the solution and its components:

Searchable?   ☐
Indexed?   ☐
Available on-line?   ☐

Comments:

35) Hours of Operation/ Service Standard for Case Resolution: Can different case types and sub-case types have different Service Level Agreements (SLAs)?

Option   ◯ Yes
                                    ◯ No

Comments:

36) Can the SLA be measured to include only business hours (e.g., the SLA is not measured when the business is "off")?

Option   ◯ Yes
                                ◯ No

Comments:

A1) What are the native work flows and how are they defined / mapped? Briefly describe how this is accomplished (in technical and non-technical terms)

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Web Forms Capabilities

37) Does the solution include the capability to create web forms?

Option   ○ Yes
                                    ○ No

Comments:

38) Can the system administrator create new web forms when needed?

Option   ○ Yes
                                    ○ No

If yes, briefly describe how this is
accomplished (in technical and non-
technical terms):

39) Are the web forms created directly in the CMS?

Option   ○ Yes
                                    ○ No

If yes, briefly describe how this is
accomplished (in technical and non-
technical terms):

40) Are the web forms managed directly in the CMS?

Option   ○ Yes
                                    ○ No

If yes, briefly describe how this is
accomplished (in technical and non-
technical terms):

41) Can web forms display field names, drop-down menu values, etc., using the client's login language?
For example, if a French user logs in to the 'web form' application and his/her preference is French, then all the menus and values in the 'web form'
application are French. If an English user accesses the same 'web form' application, then the menus and values are displayed in English.

Option   ○ Yes
                                    ○ No

Comments:

42) Can the web forms be customized? For example, can the look and feel be customized?

Option   ○ Yes

               ○ No

If so, briefly describe how this is accomplished and to what extent the web forms are customizable (in technical and non-technical terms):

43) Does the solution have web form integration capability?

Option   ○ Yes

               ○ No

Comments:

44) Are web forms hosted externally from the CMS?

Option   ○ Yes

               ○ No

If so, briefly describe how this integration between the externally hosted web forms and the CMS is accomplished (in technical and non-technical terms):

b) If web forms can be hosted externally from the CMS, can a submitted web form and the information selected in the web form automatically become a case in the CMS?   ○ Yes   ○ No

If so, briefly describe how this integration between the externally hosted web forms and the CMS is accomplished (in technical and non-technical terms):

c) If web forms are hosted externally from the CMS, can a user upload a document to the web form and then, when the web form is submitted, the information selected in the web form along with the uploaded file automatically become a case?   ○ Yes   ○ No

If so, briefly describe how this integration between the externally hosted web forms and the CMS is accomplished (in technical and non-technical terms):

45) Are web forms hosted internally to the CMS?

Option   ◯ Yes
              ◯ No

a) If so, can a submitted web form, and the information   ◯ Yes
selected in the web form, automatically become a case?   ◯ No

If so, briefly describe how this integration between the
internally hosted web form and the CMS itself is
accomplished (in technical and non-technical terms)

b) If web forms are hosted internally to the CMS, can a   ◯ Yes
user upload a document to the web form and then,   ◯ No
when the web form is submitted, the information
selected in the web form along with the uploaded file
automatically become a case?

If so, briefly describe how this integration between the
externally hosted web forms and the CMS is
accomplished (in technical and non-technical terms):

46) Does the solution have web form automatic routing capability?

Option   ◯ Yes
              ◯ No

Comments:

If so, can we customize who is assigned to a case once a   ◯ Yes
web form is submitted?   ◯ No

If so, briefly describe how the CMS and/or the web form
application are configured to allow for this behaviour (in
technical and non-technical terms).

If, in the case where the 'web form' application is hosted
externally or internally and the configuration is different,
please provide a description for both hosting methods (in
technical and non-technical terms)

47) Does the solution have web form authentication capability?

Option   ◯ Yes
              ◯ No

Comments:

[text area]

Can the web form recognize who has submitted it?   ○ Yes
                                                        ○ No

[text area]

If so, briefly describe how this authentication method
works if the 'web form' application is hosted externally or
internally.

[text area]

If, in the case where the 'web form' application is hosted
externally or internally and the configuration is different,
please provide a description for both hosting methods (in
technical and non-technical terms)

[text area]

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Standards

48) Is your solution compatible with the Web Content Accessibility Guidelines (WCAG) 2.0?

Option   ○ Yes
                      ○ No

Comments:

49) Does the solution support encryption at rest (required for Protected 'B' data), in a manner that is compliant with Communications Security Establishment (CSE) ITSB 111?

Option   ○ Yes
                      ○ No

If yes, briefly describe how
this is accomplished from a
technical perspective.

50) Does the solution support encryption in transit (required for Protected 'B' data), in a manner that is compliant with Communications Security Establishment (CSE) ITSB 111?

Option   ○ Yes
                      ○ No

If yes, briefly describe how
this is accomplished from a
technical perspective.

51) Does the solution support two factor authentication?

Option   ○ Yes
                      ○ No

If yes, briefly describe how
this is accomplished from a
technical perspective.

52) Does the solution have multilingual end user and operations-related documentation available? If so, please state which languages are available.

                      ○ N/A
                      ○ English-only
Selection   ○ French-only
                      ○ Both

If Other, please specify:

Comments:

53) Can the user interface be switched to either English Canadian or French Canadian in your solution without requiring a client logout or reinstall?

Option   ○ Yes

○ No

If yes, briefly describe how this is accomplished from an end-user perspective.

54) Can the solution allow for display of knowledge base articles in English Canadian AND in French Canadian, side by side, to allow for display in one single screen?

Option   ○ Yes

○ No

If yes, briefly describe how this is accomplished from an end-user perspective.

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Storage and Back-UP

55) What type of backup cycle is recommended for local storing of data?

56) What type of backup cycle is recommended for external storing of data?

57) What is the typical time required to fully restore data from a local storage?

58) What is the typical time required to fully restore data from external storage?

59) Can the restore process be done over the web?

Option   ◯ Yes

◯ No

Comments

60) Can the restore process be done via external hard drives?

Option   ◯ Yes

◯ No

Comments

Administrator Toolbar

61) Would it be possible for EC to retrieve/access the entire database of cases and data no matter where the solution is being hosted?

Option

　　　　　　　　○ Yes

　　　　　　　　○ No

Comment:

62) Is your solution hosted in Canada?

Option

　　　　　　　　○ Yes

　　　　　　　　○ No

Comment:

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Access and Compatability

63) Is the solution web-based?

○ Yes
○ No

64) Can the solution be accessed simultaneously from geographically dispersed locations?

Option   ○ Yes
                                                ○ No

Briefly describe how this is accomplished
(in technical and non-technical terms).

65) Which of the following are hosting options that can be used for your proposed solution?

Hosted by Supplier   ☐
Hosted by Subcontractor   ☐
Hosted by Client   ☐
Hybrid   ☐

Which is your most common model?

66) If your solution is supplier or subcontractor hosted what is the average up-time?

67) Which modern web browsers if your solution fully compatible with?

Internet Explorer 11   ☐
Edge   ☐
Chrome   ☐
Firefox   ☐
Safari   ☐
None   ☐

Other:

What is the earliest version of each browser your service supports?

68) Is your solution fully responsive to allow it to be displayed irrespective of screen size (i.e., smart phones, tablets, desktops, etc.)?

Option

    ○ Yes

    ○ No

Comments:

69) What are the minimal desktop/client requirements?

70) Are there desktop plug-ins/add-ons required (e.g., acrobat, flash macromedia, .NET framework, Sound players, etc.)?

Option

    ○ Yes

    ○ No

Comments:

71) What is the current major release version of your solution?

Response:

When was it released?

What is the date of the previous major release?

What is the expected date of the next major release version of your solution?

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Implementation and Deployment

72) What is the average 'out-of-the-box' implementation time for your solution?

Implementation time
- ○ 6 months
- ○ 1 year
- ○ 18 months
- ○ 2 years
- ○ 3 years

Comments:

73) What are the factors that have a large impact on the average implementation time for the client?

74) What are the factors that have a large impact on the average implementation time for you as the supplier?

75) Does your company provide implementation services?

Option
- ○ Yes
- ○ No - rely on consulting/integration partners

Briefly describe your services and /or those of your partners (please identify the partners).

If you rely on consulting/integration partners, are they located in the National Capital Region?
- ○ Yes
- ○ No

If you rely on consulting/integration partners, are there a wide range of partners available?
- ○ Yes
- ○ No

If you rely on consulting/integration partners, what is the typical relationship between your company, the client and the integration/partner?

[blank text box]

[blank text box]

Comments :

76) Does your company provide post–implementation support?

Option

- ○ Yes
- ○ No - rely on consulting/integration partners

Briefly describe your services and /or those of your partners (please identify the partners).

[blank text box]

If you rely on consulting support partners, are they located in the National Capital Region?

- ○ Yes
- ○ No

If you rely on consulting support partners, are there a wide range of partners available?

- ○ Yes
- ○ No

If you rely on consulting support partners, what is the typical relationship between your company, the client and the integration/partner?

[blank text box]

Comments :

[blank text box]

77) What is the approximate cost and timeline to integrate data into the CMS (to convert data from intake channels, especially to integrate seamlessly with a telephony product)? Please provide an approximate cost and timeline breakdown for major (key) integration activities.

	Cost:	Estimated elapsed time (in weeks):	Estimated man-hours of effort:
Telephone (phone number entered by the client in the VRS)			

	Cost:	Estimated elapsed time (in weeks):	Estimated man-hours of effort:
Telephony (client menu selection in the VRS, any input selected by the client, other than the telephone number of the client.)			
External Web Form solution			
Integrate to MS Exchange Server			
Integration to Fax			
User Acceptance Testing			
Comments:			

78) Can the solution be re-configured on demand / as required (e.g., when new business requirements arise)?

Option   ○ Yes

                          ○ No

If so, briefly describe how
this is accomplished (in
technical and non-technical
terms).

79) What do you see as your role on a typical implementation?

80) Is your solution currently used within the Government of Canada?

Option   ○ Yes
                                    ○ No

If yes, by whom?

81) Can you identify any challenges, changes or improvements to the implementation of your solution with other clients?

82) How and when are patches performed on your solution?
Briefly describe how this is accomplished (in technical and non-technical terms).

83) When patches are installed, are there impact(s) to the service?
Briefly describe how this is accomplished (in technical and non-technical terms).

84) How and when are patches schedules communicated?
Briefly describe how this is accomplished (in technical and non-technical terms).

85) What portions of the proposed solution does your company own?

		What is your role?
Software Publisher	☐	
Authorized reseller	☐	

		What is your role?
Integrator	☐	

86a) Does your company offer training services for the CMS application?

◯ Yes
◯ No

86b) If yes, please provide an approximate cost and timeline breakdown for major (key) integration activities:

	Cost:	Estimated elapsed time (in weeks):	Estimated man-hours of effort:
Delivering System-Admin Technical Training Session			
Development of System-Admin Technical Training modules			
Delivering End-User Training			
Development of End-User Training modules			

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Procurement

87) Are you currently pre-qualified for delivery of the solution under a Public Services and Procurement Canada (PSPC, formerly Public Works and Government Services Canada) or Shared Services Canada (SSC) procurement vehicle?

Option   ○ Yes

                                          ○ No

If yes, what is the contract #, contract

period and who is the contract with?

88) Do you currently hold a valid PWGSC Contract Security Program Facility Security Clearance for the Approval of physical security and information technology security safeguarding capabilities at the organization's site.

Option   ○ Yes

                                          ○ No

If yes, what is the Capability Type and

Renewal Cycle for both physical and

information technology capabilities?

89) Is your solution currently available commercially?

"Off-the-shelf"   ○ Yes

                                          ○ No

Modified "off-the-shelf"   ○ Yes

                                          ○ No

"Custom" solution   ○ Yes

                                          ○ No

Other, please specify:

Comments:

90) What service delivery models do you offer?

Software as a service   ○ Yes

                                          ○ No

Perpetual software license plus ongoing   ○ Yes

maintenance and support fees   ○ No

Subscription-based (annual or monthly   ○ Yes
fee)   ○ No

Other, please specify:

Comments:

91) With what has been described as our requirement, would the delivery of your solution deviate from your standard approach?

Option   ○ Yes
                                                ○ No

If yes, how so?

92) What pricing models are available for your solution?

Professional Services – hourly rate by   ○ Yes
resource category   ○ No

Software license fee + maintenance   ○ Yes
(monthly, annual, perpetual etc.)   ○ No

Firm lot price per end user   ○ Yes
                                                ○ No

                                                ○ Yes
Firm annual price per end user   ○ No

Other, please specify

Comments:

93) What pricing models would you be open to adopting?

Professional Services – hourly rate by   ○ Yes
resource category   ○ No

Software license fee + maintenance   ○ Yes
(monthly, annual, perpetual etc.)   ○ No

Firm lot price per end user   ○ Yes

○ No

Other, please specify

[ ]

Comments:

[ ]

94) Are you able to provide your current price list?

If yes, please send the documentation as an attachment via email when submitting your RFI. Instructions on emailing your documentation can be found at the RFI front cover pages.

Option   ○ Yes
           ○ No

95) The respondent is invited to provide a pricing model that may assist EC with procurement and deployment scenarios.

[ ]

96) Obtaining additional information on the current licensing model for the solution will assist us in defining our requirement. Please suggest measures that should be specified in an RFP to allow EC to achieve best value and explain why.

[ ]

97) Would your resources require travel to deliver the solution?

○ Yes
○ No

98) Would you need to own any foreground Intellectual Property rights resulting from the delivery of your solution?

Option   ○ Yes
           ○ No

If yes, why?

[ ]

99) Given the anticipated lifecycle of the solution what contract period and option year duration would you recommend for the solution?

Initial contract period (years):   [ ]

# of option years: [ ]

Comments:

100) Based on previous procurements, please identify any suggestions for changes or improvements that you wish to see in any possible future procurement and explain why.

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