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SOLICITATION AMENDMENT
MODIFICATION DE L'INVITATION

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

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

Title - Sujet System Integration (SI) Services	
Solicitation No. - N° de l'invitation 59017-160009/B	**Amendment No. - N° modif.** 006
Client Reference No. - N° de référence du client 20161265	**Date** 2018-01-09
GETS Reference No. - N° de référence de SEAG PW-$$XS-005-31998	
File No. - N° de dossier 005xs.59017-160009	**CCC No./N° CCC - FMS No./N° VME**

Solicitation Closes - L'invitation prend fin at - à **02:00 PM** on - le **2018-01-24**		**Time Zone** **Fuseau horaire** Eastern Standard Time EST

F.O.B. - F.A.B.
Plant-Usine: ☐   **Destination:** ☐   **Other-Autre:** ☐

Address Enquiries to: - Adresser toutes questions à: McManus, Robert	**Buyer Id - Id de l'acheteur** 005xs
Telephone No. - N° de téléphone (819) 420-2230 ( )	**FAX No. - N° de FAX** ( ) -

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Signature   **Date**

System Integration Services for OSFI STTR Project, SBIPS RP# 59017-160009/B

Questions and Answers

QUESTION 44: In Annex A, Statement of Work, page 68 of 94, the RFP indicates that the out of the box (OOB) interface between Dynamics and SharePoint cannot be used with the eSpace instance and that the EDRMS, a custom interface will have to be modified to accommodate Dynamics. Could you, please, specify in which respect the OOB interface does not comply with eSpace?

ANSWER 44: OSFI's eSpace EDRMS has a robust metadata-based information architecture that is based on business activities. The Dynamics CRM OOB SharePoint interface uses a simple SharePoint folder structure that does not follow the eSpace information architecture. OSFI has developed an EDRMS service that provides the metadata required by eSpace, based on the business context, so Dynamics CRM will need to use this service when storing or accessing documents in eSpace.

QUESTION 45: Regarding Section 4.1.2 Architectural Context for the STTR System, page 29 of 94, we understand that the use of the EDRMS service for eSpace interoperation is required as opposed to the native CRM Dynamics/SharePoint integration. Could you, please, define the eSpace specifications that would not be met by the use of the native integration by the two platforms?

ANSWER 45: See answer #44.

QUESTION 46: With regard to Section 4.1.2 Architectural Context for the STTR System, page 29 of 94, is interoperation between eSpace (SharePoint) and Dynamics CRM using EDMRS Web Service should be implemented in both directions (eSpace To CRM and CRM to eSpace)? Two direction means that eSpace may call Dynamics to update some related entities data to reflect the changes made inside eSpace. Could you, please, provide more details?

ANSWER 46: Interoperation between eSpace (SharePoint) and Dynamics CRM will only be required in one direction; CRM to eSpace. There is no requirement to update entity data in Dynamics CRM when documents are added or updated in eSpace.

QUESTION 47: For Attachment 1 – STTR System Implementation Requirements, page 68 of 94, regarding the Supervision Business Process described in detail in the user stories file, is there any user story (requirement) related to Enterprise Planning Tool or most of them are related to Core Dynamics CRM platform? For example: Capital Model Approval Process (CMAP), Continuous monitoring and so on. Could you, please, provide more details?

ANSWER 47: The user stories do not specifically map to a technology (e.g. Enterprise Planning Tool) and are provided for additional context only. The Bidder should propose an Enterprise Planning that meets the Non-Functional and Functional requirements set out in attachments 2 and 3 respectively.

QUESTION 48: With regard to SI-093 of Annex A, Statement of Work, page 71, could you please define in more details what is meant by the following "thematic assessment entities and perspectives"?

ANSWER 48: Examples of thematic assessment activities are provided in the description of SI-092. "Thematic assessment entities" refers to the structured data (in the form of Dynamics CRM entities)

required to support these activities. An information model (conceptual data model) is provided in Appendix A (available upon request). "Perspectives" refers to the ability to present the information in a variety of ways (e.g. dashboards or views) tailored to specific users or types of users.

QUESTION 49: With regard to Section 4.1.2 Architectural Context for the STTR System, page 29 of 94, we understand that the Dynamic CRM implementation will be used for online and offline purposes. Could you, please, identify which function(s) is(are) used in an offline mode?

ANSWER 49: As stated in SOW, offline access is an important requirement for the STTR System. OSFI will select and provide licenses for software supporting mobile and offline capability in Dynamics CRM if out-of-the-box platform functionality cannot address the identified business requirements.

QUESTION 50: In Attachment 3 – Enterprise Planning Tool Functional Requirements of the Statement of Work, page 78 of 94, FR Item #7 states "The Enterprise Planning Tool software should have the capability to create user defined groups or use pre-defined groups from other sources." Is this question more a technical question related to access rights management using groups? What is behind the definition of "pre-defined groups from other sources"?

ANSWER 50:

OSFI requires the ability to create and import (e.g. from a spreadsheet) arbitrary groups of resources (e.g. a team list). These user-defined/pre-defined groups do not necessarily control access rights within the enterprise planning tool.

QUESTION 51: In Attachment 3 – Enterprise Planning Tool Functional Requirements of the Statement of Work, page 81 of 94, FR Item #23 states "The Enterprise Planning Tool software must have the capability to propose suggested activities for a FRFI based on its Supervisory intensity." Could you please clarify the meaning of "FRFI based on its Supervisory intensity"?

ANSWER 51: Supervisory intensity refers to the level of oversight that an individual FRFI is subjected to. This is based on considerations such as its risk assessment and its business complexity, as well as OSFI's risk tolerance for that type of FRFI and information decay of the FRFI's latest risk assessment.

QUESTION 52: In Attachment 3 – Enterprise Planning Tool Functional Requirements of the Statement of Work, page 84 of 94, FR Item #43 states "The Enterprise Planning Tool software should have the capability to report on activities within the queue to support planning and management of activities (e.g. time on queue, types on queue)." Could you please provide us with examples that illustrates how the queue is managed today, what kind of layout or graphical representation is used, what kind of indicators?

ANSWER 52: OSFI currently does not have this capability.

QUESTION 53: In Attachment 3 – Enterprise Planning Tool Functional Requirements of the Statement of Work, page 87 of 94, FR Item #62 states "The Enterprise Planning Tool software must provide content version control and allow business rules to be defined to manage the retention and disposition of content." Could you please give us more information about content version control: what is a "content", how "version control" works?

ANSWER 53: Content is any data managed within the tool; and version control is the ability to store and view the audit trails of changes to the content.

QUESTION 54: From Section 4.1.2 Architectural Context for the STTR System, page 29 of 94, we understand that the use of the EDRMS service for eSpace interoperation is required as opposed to the native CRM Dynamics/SharePoint integration. Could you please define the eSpace specifications that would not be met by the use of the native integration by the two platforms?

ANSWER 54: Refer to answer # 45 and 46 above.

QUESTION 55: We understand from a previous question and answer that OSFI has stated that it cannot change the Security Requirements Checklist. We also understand that OSFI did release the RFI in September to give industry advance notice of the resource and security clearance requirements. To enable OSFI to receive the best quality and competitive proposals, we request that the resource security clearances be required at time of contractor onboarding vs. at time of bid submission.

ANSWER 55: As previously stated, OSFI has operational requirements which necessitate that there are no delays to award of the Contract or to the start of work due to Security Clearances not being in place. The Requirement remains unchanged.

QUESTION 56: With regard to Rated requirement R-8.5 b), sub-bullets b and d both show the same wording: "A SQL Server Integration Services (SSIS) based integration architecture for structured data integration from other repositories". Can the client please advise if one of the bullets is a duplicate and if it should be removed; or should one of the bullets have different wording?

ANSWER 56: The bullet is a duplication and has been removed. See RFP change below.

QUESTION 57: In Annex A, Statement of Work, Section 4.3.1, page 33 of 94 of the RFP, we understand that the Outlook integration is an important aspect of the STTR roadmap, but since the current architecture includes Microsoft Exchange 2010, which limits the tools available for Outlook integration to the Outlook plugin (as opposed to the new Outlook app). Could you please explain in greater detail their Exchange upgrade roadmap so we can assess the potential impacts of an Exchange upgrade during the STTR project?

ANSWER 57: OSFI is currently engaged in an upgrade to Windows 10 and Office 2016, so while the current state is Office 2010, it is assumed that by contract award, or within a quarter, OSFI's Outlook platform will be upgraded to 2016.

RFP Change

a) At Attachment 4.1 – Technical Evaluation Criteria, Requirement R-8.5 Dynamics CRM Development Specialist:

   DELETE:

b) The Bidder should demonstrate, using project descriptions, that the resource	20	Up to 10 points per project (maximum 2 projects) will be awarded based on the total number of

has experience, on up to two projects for a minimum duration of six months (per project), within the six years preceding the issuance date of this RFP, integrating Dynamics CRM version 2011 (or more recent) solutions with the following:
  a. An Enterprise Planning COTS Software solution;
  b. A SQL Server Integration Services (SSIS) based integration architecture for structured data integration from other repositories;
  c. SharePoint-based EDRMS solution that includes third party platform extensions such as RecordPoint for records management;
  d. A SQL Server Integration Services (SSIS) based integration architecture for structured data integration from other repositories;
  e. Software supporting integration of Dynamics CRM with Outlook, such as Microsoft Dynamics CRM for Outlook;
  f. Software supporting checkout and resynchronization of information for offline use of Dynamics CRM and SharePoint components;
  g. Master Data Management software, such as SQL Server Master Data Services (MDS); or
  h. Secure single sign-on authentication technologies.
		technologies integrated in a single project demonstrated as follows:
		• **2 points** – Per technology integrated (to a maximum of 5 out of 8 technologies demonstrated).

And INSERT:

b) The Bidder should demonstrate, using project descriptions, that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the six years preceding the issuance date of this RFP, integrating Dynamics CRM version 2011 (or more recent) solutions with the following:
  a. An Enterprise Planning COTS Software solution;
  b. A SQL Server Integration Services (SSIS) based integration architecture for
	20	Up to 10 points per project (maximum 2 projects) will be awarded based on the total number of technologies integrated in a single project demonstrated as follows:
		• **2 points** – Per technology integrated (to a maximum of 5 out of 7 technologies demonstrated).

structured data integration from other repositories; c. SharePoint-based EDRMS solution that includes third party platform extensions such as RecordPoint for records management; d. Software supporting integration of Dynamics CRM with Outlook, such as Microsoft Dynamics CRM for Outlook; e. Software supporting checkout and resynchronization of information for offline use of Dynamics CRM and SharePoint components; f. Master Data Management software, such as SQL Server Master Data Services (MDS); or g. Secure single sign-on authentication technologies.		