**Part - Partie 1 of - de 2**
**See Part 2 for Clauses and Conditions**
**Voir Partie 2 pour Clauses et Conditions**

Public Works and Government Services Canada

Travaux publics et Services gouvernementaux Canada

**RETURN BIDS TO:**
**RETOURNER LES SOUMISSIONS À:**

**Bid Receiving - PWGSC / Réception des soumissions - TPSGC**
**11 Laurier St., / 11, rue Laurier**
**Place du Portage, Phase III**
**Core 0B2 / Noyau 0B2**
**Gatineau**
**Québec**
**K1A 0S5**
**Bid Fax: (819) 997-9776**

**LETTER OF INTEREST**
**LETTRE D'INTÉRÊT**

| Title - Sujet |
|---|
| RFI / LOI - Informatics Professiona |

| Solicitation No. - N° de l'invitation | Date |
|---|---|
| 08915-170500/A | 2019-04-01 |

| Client Reference No. - N° de référence du client | GETS Ref. No. - N° de réf. de SEAG |
|---|---|
| 20170500 | PW-$$EL-618-34933 |

| File No. - N° de dossier | CCC No./N° CCC - FMS No./N° VME |
|---|---|
| 618el.08915-170500 | |

| Solicitation Closes - L'invitation prend fin at - à 05:00 PM on - le 2019-04-08 | Time Zone Fuseau horaire Eastern Daylight Saving Time EDT |
|---|---|

**F.O.B. - F.A.B.**

Plant-Usine: ☐   Destination: ☐   Other-Autre: ☐

| Address Enquiries to: - Adresser toutes questions à: | Buyer Id - Id de l'acheteur |
|---|---|
| Laassouli(EL DIV.), Hicham | 618el |

| Telephone No. - N° de téléphone | FAX No. - N° de FAX |
|---|---|
| (613) 858-9817 (   ) | (   )   - |

**Destination - of Goods, Services, and Construction:**
**Destination - des biens, services et construction:**

Foreign Affairs, Trade and Development Canada
LB PEARSON BLDG TWR C3
125 SUSSEX DR.
OTTAWA
Ontario
K1A0G2
Canada

**Comments - Commentaires**

**Instructions:  See Herein**

**Instructions:  Voir aux présentes**

**Vendor/Firm Name and Address**
**Raison sociale et adresse du fournisseur/de l'entrepreneur**

| Delivery Required - Livraison exigée | Delivery Offered - Livraison proposée |
|---|---|
| See Herein | |

**Vendor/Firm Name and Address**
**Raison sociale et adresse du fournisseur/de l'entrepreneur**

**Telephone No. - N°de téléphone**
**Facsimile No. - N° de télécopieur**

**Issuing Office - Bureau de distribution**
Informatics Professional Services - EL Division/Services professionnels en informatique - division EL
Terrasses de la Chaudière 4th Floo
10 Wellington Street
Gatineau
Québec
K1A 0S5

**Name and title of person authorized to sign on behalf of Vendor/Firm (type or print)**
**Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)**

**Signature**                                    **Date**

Canada

.

# REQUEST FOR INFORMATION REGARDING

# INFORMATICS PROFESSIONAL SERVICES

# FOR

# DEPARTMENT OF FOREIGN AFFAIRS, TRADE AND

# DEVELOPMENT'S (DFATD)

## TABLE OF CONTENTS

Annex A: Draft Statement of Work
Annex B: Draft Pricing Schedule
Annex C: Draft Resource Assessment Criteria
Annex D: Response Table – Draft Pricing Schedule
Annex E: Response Table – Draft Resource Assessment Criteria

.

## 1    Purpose and Background of this Request for Information (RFI)

The intent of this Request for Information (RFI) is to solicit feedback from industry on the structure of the Draft Pricing Schedule under Annex B as well the Draft Resource Assessment Criteria under Annex C.

### Overview

The Government of Canada has a requirement for Informatics Professional services on an as required basis to support the Import and Export Control System (EICS II) Upgrade Program. EICS controls the flow of goods between Canada and its trading partners, this is a major upgrade to the platform and its functionality.

The Requirement will be aligned to the following Workstreams:

- Workstream 1: Data Management

- Workstream 2 : Application Services

- Workstream 3: Testing Services

- Workstream 4: Technical Services

- Workstream 5: Project Support Services

## 2    Nature of Request for Information

This is not a bid solicitation. This RFI will not result in the award of any contract. As a result, potential suppliers of any goods or services described in this RFI should not reserve stock or facilities, nor allocate resources, as a result of any information contained in this RFI. Nor will this RFI result in the creation of any source list. Therefore, whether or not any potential supplier responds to this RFI will not preclude that supplier from participating in any future procurement. Also, the procurement of any of the goods and services described in this RFI will not necessarily follow this RFI. This RFI is simply intended to solicit feedback from industry with respect to the matters described in this RFI.

## 3    Nature and Format of Responses Requested

Respondents are requested to provide their comments, concerns and, where applicable, alternative recommendations regarding how the requirements or objectives described in this RFI could be satisfied. Respondents are also invited to provide comments regarding the content, format and/or organization of any draft documents included in this RFI. Respondents should explain any assumptions they make in their responses.

## 4    Response Costs

Canada will not reimburse any respondent for expenses incurred in responding to this RFI.

## 5    Treatment of Responses

**(a)    Use of Responses**: Responses will not be formally evaluated. However, the responses received may be used by Canada to develop or modify procurement strategies or any draft documents contained in this RFI. Canada will review all responses received by the RFI closing date. Canada may, in its discretion, review responses received after the RFI closing date.

**(b)    Review Team**: A review team composed of representatives of the client (where applicable) and PWGSC will review the responses. Canada reserves the right to

.          hire any independent consultant, or use any Government resources that it considers necessary to review any response. Not all members of the review team will necessarily review all responses.

**(c)** **Confidentiality**: Respondents should mark any portions of their response that they consider proprietary or confidential. Canada will handle the responses in accordance with the *Access to Information Act*.

**6**     **Contents of this RFI**

**(a)** This RFI contains a draft Statement of Work, a draft Pricing Schedule and a draft Resource Assessment Criteria for Workstream 1. These documents remain a work in progress and respondents should not assume that new clauses or requirements will not be added to any bid solicitation that is ultimately published by Canada. Nor should respondents assume that none of the clauses or requirements will be deleted or revised. Comments regarding any aspect of these draft documents are welcome.

**(b)** This RFI also contains specific questions addressed to the industry.

**7**     **Questions to Industry**

**(a)** Respondents are requested to review the draft Pricing Schedule under Annex B and respond to the associated questions under Annex D

**(b)** Respondents are requested to review the draft Resource Assessment Criteria under Annex C and respond to the associated questions under Annex E

**8**     **Format of Responses**

**(a)** **Cover Page**: If the response includes multiple volumes, respondents are requested to indicate on the front cover page of each volume the title of the response, the solicitation number, the volume number and the full legal name of the respondent.

**(b)** **Title Page**: The first page of each volume of the response, after the cover page, should be the title page, which should contain:

(i)      the title of the respondent's response and the volume number;

(ii)     the name and address of the respondent;

(iii)    the name, address and telephone number of the respondent's contact;

(iv)    the date; and

(v)     the RFI number.

**(c)** **Numbering System**: Respondents are requested to prepare their response using a numbering system corresponding to the one in this RFI. All references to descriptive material, technical manuals and brochures included as part of the response should be referenced accordingly.

**(d)** **Number of Copies**: Canada requests that respondents submit 1 soft copy of their responses.

**9**     **Enquiries**

Because this is not a bid solicitation, Canada will not necessarily respond to enquiries in writing or by circulating answers to all potential suppliers. However, respondents with questions regarding this RFI may direct their enquiries to:

Contracting Authority:   Hicham Laassouli
E-mail Address:          hicham.laassouli@tpsgc-pwgsc.gc.ca
Telephone:               613-858-9817

.

**10      Submission of Responses**

    **(a)**    **Time and Place for Submission of Responses**: Suppliers interested in providing a response should deliver it to the Contracting Authority identified above by the time and date indicated on page 1 of this document.

    **(b)**    **Responsibility for Timely Delivery**: Each respondent is solely responsible for ensuring its response is delivered on time to the correct location.

    **(c)**    **Identification of Response**: Each respondent should ensure that its name and return address, the solicitation number and the closing date appear legibly on the outside of the response.

    **(d)**    **Responsibility for Timely Delivery**: Each respondent is solely responsible for ensuring its response is delivered on time to the correct location.

    **(e)**    **Bid Receiving Unit Address Solely for Delivery of Responses**: The above address is only for bid submission. No other communications are to be forwarded to this address.

.

# ANNEX A
# DRAFT STATEMENT OF WORK
(SEE ATTACHED HERETO)

.

# ANNEX B
# DRAFT PRICING SCHEDULE

**Workstream 1: Data Management**

| Initial Contract Period | | |
| --- | --- | --- |
| **Resource Category** | **Level of Expertise** | **Firm Per Diem Rate** |
| Programmer/Software Developer | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Programmer/Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Application/Software Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Data Conversion Specialist | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Quality Assurance Specialist/Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |

**Workstream 2: Application Services**

| Initial Contract Period | | |
| --- | --- | --- |
| **Resource Category** | **Level of Expertise** | **Firm Per Diem Rate** |
| System Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Application/Software Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Technical Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Database Administrator | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Network Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Technical Writer | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |

**Workstream 3: Testing Services**

| Initial Contract Period | | |
| --- | --- | --- |
| **Resource Category** | **Level of Expertise** | **Firm Per Diem Rate** |
| Test Coordinator | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Tester | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |

**Workstream 4: Technical Services**

| Initial Contract Period | | |
| --- | --- | --- |
| **Resource Category** | **Level of Expertise** | **Firm Per Diem Rate** |
| Tester | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Technical Writer | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Business Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Courseware Developer | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Change Management | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Project Manager | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |

**Workstream 5: Project Support Services**

| Initial Contract Period | | |
| --- | --- | --- |
| **Resource Category** | **Level of Expertise** | **Firm Per Diem Rate** |
| Application/Software Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Technology Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Project Scheduler | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |
| Project Manager | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 70% of level 3 |

.

# ANNEX C
# DRAFT RESOURCE ASSESSMENT CRITERIA
(SEE ATTACHED HERETO)

.

# ANNEX D
# RESPONSE TABLE – DRAFT PRICING SCHEDULE

As the purpose of this RFI is to solicit industry feedback with respect to DFATD requirement, respondents are invited to submit answers in response to the questions below. Respondents are encouraged to submit answers to as many questions as possible.

| |
|---|
| 1 - Please state any questions or concerns you may have regarding Annex B - Draft Pricing Schedule |
| |
| 2 - Would you be interested in submitting a bid to provide the services described in this RFI given the structure of the Pricing under Annex B – Draft Pricing Schedule? |
| |
| 3 - Does the pricing restriction for Level 1 and 2 allow you to reflect a reasonable price differential between each of the three resource Levels given the technical requirements asked for by Canada? |
| |
| 4 - Would the pricing structure in the Draft Pricing Schedule limit or prevent your company from bidding on a future RFP for these services? |
| |
| 5 – Would you be interested in submitting a bid if, under the Pricing Schedule, Canada asked for separate pricing for different technologies under the same resource category?  For example, separate pricing for a Programmer/Software Developer - .Net and a Programmer/Software Developer – Siebel. |
| |

.

# ANNEX E
# RESPONSE TABLE – DRAFT RESOURCE ASSESSMENT CRITERIA

As the purpose of this RFI is to solicit industry feedback with respect to DFATD requirement, respondents are invited to submit answers in response to the questions below. Respondents are encouraged to submit answers to as many questions as possible.

| |
|---|
| 1 - Please state any questions you may have about the Annex C - Draft Resource Assessment Criteria. |
| |
| 2 - Would you be interested in submitting a bid to provide the services described in this RFI? |
| |
| 3 - Would your company be able to provide resources based on the criteria outlined in Annex C – Draft Resource Assessment Criteria? |
| |
| 4 – Would you have any changes to suggest to Annex C – Draft Resource Assessment Criteria that would enable your company to bid on a future RFP for these services? |
| |
| 5- Please provide any other information that you believe would be useful in preparing an RFP for the services described in this RFI. |
| |

**ANNEX A**
**STATEMENT OF WORK**

**1.0     TITLE**

Informatics Professional Services for the following WorkStreams:

1. Workstream 1: Data Management
2. Workstream 2 : Application Services
3. Workstream 3: Testing Services
4. Workstream 4: Technical Services
5. Workstream 5: Project Support Services

**2.0     BACKGROUND**

The Department of Foreign Affairs, Trade and Development's (DFATD) primary responsibility is the promotion and protection of Canada's interests abroad and the conduct of Canada's relations with other countries.

The Department is headquartered in Ottawa, and maintains a presence internationally. DFATD operates an extensive network of missions (embassies, high commissions, and consulates), honorary consulates, and other representational offices. Within Canada, DFATD operates through regional offices of Passport Canada and a network of trade commissioners working in International Trade Offices across the country.

The spread and complexity of Canada's representation abroad has a profound impact on the nature and scope of the Department's IM/IT equipment, networks and infrastructure. The design, implementation and operation of IM/IT services are hugely affected by the extent to which Canada's employees abroad are scattered around the world; by the enormous differences encountered in diverse public infrastructures and technologies available internationally; and by the competing interests of host countries; and by hosting Government of Canada departments and agencies operating abroad.

**3.0     OBJECTIVE**

To obtain Informatics Professional services on an as required basis to support the Import and Export Control System (EICS II) Upgrade Program. EICS controls the flow of goods between Canada and its trading partners, this is a major upgrade to the platform and its functionailty.

**4.0     TECHNICAL ENVIRONMENT**

Microsoft .NET
Microsoft IIS servers
IBM WebSphere
IBM/COGNOS BI
Siebel CRM
Microsoft infrastructure
Microsoft SQL Server 2014

**5.0     SCOPE OF WORK**

**5.1**     The Contractor must provide informatics professional services to DFATD on an "as and when requested" basis as initiated through Task Authorizations (TAs).  TAs may be issued for any of the resource categories  identified in 5.3 below.

**5.2     Key Program Initiatives**

Key program initiatives to be supported but are not limited to:

5.2.1     Export Import Control System (EICS II)

The EICS II technical environment at DFATD will be based on the Siebel 15.7 (IP 2015 Patchset 7) application, which will serve as the internal permit management application.  In the Public Access Zone (PAZ), DFATD will be hosting a .NET web application which allows businesses to apply for the permits.  All servers will be running Windows Server 2008 R2 as the Operating System with MS SQL 2014 on DFATD's SQL cluster.

In general, the support, maintenance and enhancements of applications involving activities such as:
- Requirements Definition and Analysis
- Application Design and Development
- Testing
- Problem Report Management
- Application Deployment
- Software Platform Maintenance
- Environment/Application Monitoring
- User and Technical Documentation

### 5.3 Streams and Resource Categories

*Although a common task list is presented for all categories, GAC recognizes that work assignments defined at the Task Authorization may warrant a higher level resource as the work may be deemed more complex by the nature of the project or operational context. GAC identifies project or operational complexity as a combination of factors such as project value and or complexity, having a timeline in excess of 6 months, or involving supervising deliverables of the more junior category resources associated with it.*

5.3.1 Stream 1 – Data Management

| TBIPS ID | RESOURCE CATEGORY | TBIPS Levels |
|---|---|---|
| A.1 | Application/Software Architect | 1,2,3 |
| A.6 | Programmer/Software Developer | 1,2,3 |
| A.7 | Programmer / Analyst | 1,2,3 |
| I.1 | Data Conversion Specialist | 1,2,3 |
| P.11 | Quality Assurance Specialist / Analyst | 1,2,3 |
| P.11 | Quality Assurance Specialist / Analyst | 1,2,3 |

5.3.2 Stream 2 – Application Services

| TBIPS ID | RESOURCE CATEGORY | TBIPS Levels |
|---|---|---|
| A.1 | Application / Software Architect | 1,2,3 |
| A.8 | System Analyst | 1,2,3 |
| I.2 | Database Administrator | 1,2,3 |
| I.6 | Network Analyst | 1,2,3 |
| I.10 | Technical Architect | 1,2,3 |
| I.11 | Technology Architect | 1,2,3 |
| B.14 | Technical Writer | 1,2,3 |

5.3.3 Stream 3 – Testing Services

| TBIPS ID | RESOURCE CATEGORY | TBIPS Levels |
|---|---|---|
| A.10 | Test Coordinator | 1,2,3 |
| A.11 | Tester | 1,2,3 |

5.3.4 Stream 4 – Technical Services

| TBIPS ID | RESOURCE CATEGORY | TBIPS Levels |
|---|---|---|
| A.11 | Tester | 1,2,3 |
| B.1 | Business Analyst | 1,23 |
| B.9 | Couseware Developer | 1,2,3 |
| B.14 | Technical Writer | 1,2,3 |
| P.1 | Change Management Consultant | 1,2,3 |
| P.9 | Project Manager | 1,2,3 |

### 5.3.5    Stream 5 – Project Support Services

| TBIPS ID | RESOURCE CATEGORY | TBIPS Levels |
|---|---|---|
| A.1 | Application / Software Architect | 1,2,3 |
| I.11 | Technology Architect | 1,2,3 |
| P.9 | Project Manager | 1,2,3 |
| P.10 | Project Scheduler | 1,2,3 |
| P.10 | Project Scheduler | 1,2,3 |

## 5.4    Tasks and Resource Specific Deliverables

### 5.4.1    Workstream 1: Data Management

#### 5.4.1.1  A.1 - *Application/Software Architect*

Tasks include, but are not limited to the following:

Supporting and enhancing Siebel application systems by:

- Translating functional and business requirements into technical requirements via SUC/SREQs and other artifacts in the requirements management tool;
- Collecting and documenting technical and functional requirements based on new business requirements;
- Analyzing business requirements, conducting options analysis and preparing options analysis reports which include the analysis of solutions, estimated delivery plans, required resources and cost estimates for each solution.
- Defining and documenting the systems design using out-of-the box Siebel;
- Incorporating recommendations / requirements resulting from architecture decisions, security evaluations and/or testing into system designs;
- Preparing or assisting in the creation of architectural documentation;
- Providing consultation and support to the project team related to the Siebel implementation best practices;
- Defining and documenting interfaces within application sub-systems, to external systems and between new and existing systems;
- Identifying and documenting system specific standards and frameworks;
- Preparing and presenting briefings, presentations/demos, updates, briefing notes, and/or reports.

#### 5.4.1.2  A.6 - *Programmer/Software Developer*

Tasks include, but are not limited to the following:

Supporting and enhancing Siebel application systems by:

- Updating existing code and/or developing new code as per functional designs to produce new versions of the application;
- Developing Scripts and Scenarios;
- Analyzing business requirements;
- Developing report requirements
- Packaging the new builds;

- Performing version control activities for releases incorporating new requirements;
- Preparing new versions for release/deployment;
- Conducting unit testing activities on new versions;
- Analyzing and fixing reported bugs/problems;
- Monitoring and fixing issues related to the interfaces with non-Siebel platforms such as SAP, .NET;
- Tracking and reporting the status of reported problem reports;
- Attending problem review board meetings;
- Testing bug fixes;
- Performing/participating in product upgrades;
- Applying patches;
- Monitoring and addressing system performance and availability; and,
- Providing presentation/demos.

### 5.4.1.3  A.7 - *Programmer / Analyst*

Tasks include, but are not limited to the following:

Supporting and enhancing .NET application systems by:

- Updating existing code and/or developing new code as per functional designs to produce new versions of the application;
- Developing scripts and scenarios;
- Analyzing system requirements;
- Performing version control activities for releases incorporating new requirements;
- Conducting unit testing activities on new versions;
- Analyzing and fixing reported bugs/problems;
- Tracking and reporting the status of reported problem reports;
- Attending problem review board meetings;
- Testing bug fixes;
- Performing/participating in product upgrades / applying patches;
- Monitoring and addressing system performance and availability;
- Providing presentation/demos.

### 5.4.1.4  I.1 –*Data Conversion Specialist*

Tasks include, but are not limited to the following:

- documenting, implementing and maintaining the Logical Data Model (LDM) and physical Siebel databases for the EICS II application
- Working in collaboration with the design and development team,
- Maintaining and updating the LDM and physical Siebel databases for the EICS II system, as required including impacts from change requests and TFS bugs/issues;
- Maintaining and updating the code tables for the EICS II system, as required including impacts from change requests and TFS bugs/issues;
- designing, planning, developing and executing the data migration activities and processes required to migrate the DFATD systems into the new EICS II system

- Maintaining and/or finalizing documentation such as data migration process inventory, EICS & EXCOL database tables & columns not being migrated, data migration requirements document, go-live migration steps, Siebel deployment steps and various other complex mappings documents
- Completing the design, documenting, development and implementation of a fully optimized data migration process using Siebel's EIM, SQL scripts and SSIS packages
- Identifying EICS & EXCOL data quality issues and providing data cleansing recommendations to business for resolution and/or action
- Providing data analysis services and SQL script support to various project team members such as the Business team, Design team, Developers, Testers and Business Intelligence team
- For EICS II project change requests (CRs):
- Providing estimations on impact and level of efforts as it relates to data migration activities
- Implementing approved change requests impacting data migration
- Analyzing and resolving data migration defects reported in TFS
- Participating in the EICS II dry-run planning and execution
- Performing data migration activities in the deployment of Siebel releases to the various environments (SYSTEST, STAGING etc.)
- Performing DBA activities/tasks in support of EICS II project deployments and environments
- Performing pre & post data migration validation/verification including audit reports with each release, up to and including Go-Live
- Executing Pre-Go live data migrations activities two weeks prior to Go-live
- Executing Go-live data migration activities on Go-live weekend
- Providing post-migration support activities:
- Ensuring that the EICS and EXCOL databases remain accessible in case DFATD data is required for a fix in EICS-II
- Addressing non-critical exceptions encountered during migration
- Addressing any data issues that may arise as users start using the new EICS-II system
- Coordinating data cleansing in the new EICS-II database

### 5.4.1.5 P.11 –*Quality Assurance Specialist / Analyst*

Tasks include, but are not limited to the following:

- Leading development of test plans, test scripts and test data;
- Participating in functional and technical design reviews as required;
- Conducting functional, integration and system regression testing;
- Documenting test results;
- Triaging of QA/UAT defects;
- Identifying and documenting software defects;
- Participating in deployment activities such as pre-sanity;
- Providing estimates for Change Requests;
- Providing demos/walkthroughs, as required to Team/Technical Lead, client or other stakeholders.
- Writing and executing software test cases against system requirements;
- Creating automation test cases;
- Finding and reporting bugs;
- Creating and maintaining test suites;
- Performing system, regression, functional, performance, load and exploratory testing;

### 5.4.1.6  P.11 –*Quality Assurance Specialist / Analyst*

Tasks include, but are not limited to the following:

- Writing and executing software test cases against system requirements;
- Creating automation test cases;
- Finding and reporting bugs;
- Creating and maintaining test suites;
- Performing system, regression, functional, performance, load and exploratory testing;

### 5.4.2  Workstream 2: Application Services

### 5.4.2.1  A.1 - *Application/Software Architect*

Tasks include, but are not limited to the following:

- Installing, configuring and administering Siebel.
- Installing, configuring and administering Oracle BI Publisher
- Installing, configuring and administeingr a search tool integrated with Siebel.
- Designing, building and testing automated installation procedures.
- Creating draft documents – Install and configuration, Run/Operations/Troubleshooting, Build Books, Run books.
- Interfacing with the client on infrastructure support, configuration (e.g. on the load balancing technologies), and support to the Department for the deployment of the application
- Providing post-implementation support to the team and in the system.

### 5.4.2.2  A.8 - *System Analyst*

Tasks include, but are not limited to the following:

- Installing, configuring and administering IBM WebSphere MQ.
- Designing, building and testing automated installation procedures.
- Interfacing with the client on infrastructure support, configuration (e.g. on load balancing technologies) and support to the department for the deployment of the application.
- Performing system, regression, functional, performance, load and exploratory testing.
- Installing, configuring and administering .NET application deployment packages

### 5.4.2.3  I.2 - *Database Administrator*

Tasks include, but are not limited to the following:

- Customizing database conversion routines.
- Developing Data Conversion Strategies.
- Generating new database with internal clients.
- Developing and implementing procedures for data stored in the database.
- Designing, developing and implementing security procedures for the database, including access and user account management.
- Advising programmers, analysts, and users about the efficient use of data and SQL queries.
- Defining interrelationships between data as it relates to data model.
- Maintaining configuration control of the database.
- Data architecture

- o  Designing changes to schema and to existing application/tables/data structures
- o  Performing Impact analysis and table modification
- o  Archiving design and implementation
- Performing and/or coordinating updates to the database design.
- Controling and coordinating changes to the database, including the deletion of records, changes to the existing records, and additions to the database.
- Participating in the development and coordination of the back-up, the disaster recovery and virus protection procedures.
- Providing Data Management / Data Analysis support to Analysts, Developers, Testers, Business Analysts, and Business Intelligence Analysts.
- Analyzing issues and controling, coordinating and implementing fixes using Siebel EIM
- Developing, deploying and executing SQL scripts from and to different environments.
- Configuratiing, managing, documenting, deploying, supporting, maintaining and troubleshooting of ALWAYSON, TLS encryption, TDE encryption, and data auditing
- Troubleshooting SQL server (including Siebel).
- Debugging database or query performance issues
- Implementting and supporting Oracle Secure Enterprise Search (OSES) databases.

### 5.4.2.4  I.6 - *Network Analyst*

Tasks include, but are not limited to the following:

- Analyzing and troubleshooting problems within a diverse Windows environment.
- Performing system administration within a windows environment.
- Implementing application clustering using Microsoft Clustering.
- Configuring applications to use load balancer.
- Implementing, maintaining and troubleshooting firewalls.
- Creating draft documents such as install and configuration documents, and Run/Ops/Troubleshooting documents.

### 5.4.2.5  I.10 - *Technical Architect*

Tasks include, but are not limited to the following:

- Overseeing end-to-end architectural integrity and the relationship with other projects within the context of the business program.
- Implementing strategic solutions that address identified business challenges.
- Maintaining a full software development lifecycle perspective and maintain consistency with Enterprise and industry standards and delivery capabilitie (Software Development Cycle)
- Identifying and translating system requirements into software design documentation. Assessing the validity of the design based on the requirements.
- Working closely with developers and the performance testing team to ensure proper implementation.
- Providing recommendations on and evaluating deployment options with a view to risk minimization.
- Ensuring the integration and full interoperability of all aspects of technology solutions.
- Evaluating hardware and software relative to their ability to support specified requirements.
- Determining potential and actual bottlenecks, and improving system performance through recommendations.

### 5.4.2.6 I.11 - *Technology Architect*

Tasks include, but are not limited to the following:

- Overseeing end-to-end architectural integrity and the relationship with other projects within the context of the business program.
- Converting business requirements into strategic solutions that address identified business challenges.
- Maintain a full software development lifecycle perspective and concern his/her self with maintaining consistency with Enterprise and industry standards and delivery capabilities.
- Providing recommendations expertise to identify and translate system requirements into software design documentation.
- Assessing the validity of the design based on the requirements.
- Working closely with developers to ensure proper implementation. Act as liaison between the Client (through the Business Analyst) and the developers.
- Providing recommendations on and evaluating deployment options with a view to risk minimization.
- Ensuring all aspects of technology solutions are integrated per the business plan.
- Evaluating and recommending hardware and software relative to their ability to support specified requirements.
- Determining potential and actual bottlenecks, and improving system performance through recommendations.

### 5.4.2.7 B.14 - The *Technical Writer*

Tasks include, but are not limited to the following:

- Working with team resources to determine what type and level of documentation (ex : build books, technical documentation, user manuals, , etc.) is required and planning  production of required documents.
- Reviewing documentation standards and the existing project documentation and making recommendations on improvements.
- Gathering information concerning the features and functions provided by the technical resources.
- Assessing the audience for the documents/manuals and write or edit the required content.
- Validating the accuracy of the information collected.
- Coordinating the preparation of any required illustrations and diagrams.
- Designing the layout of the documents/manuals.
- Providing usability studies where needed to improve the design of an application that is being developed.
- Using word-processing, desk-top publishing and graphic software packages to produce final copies.
- Providing briefings and status reports to management.
- Participating in team meetings.

### 5.4.3   Workstream 3: Testing Services

#### 5.4.3.1  A.10 - *Test Coordinator*

Tasks include, but are not limited to the following:

- Directing performance test planning and coordination.
- Performance testing in accordance with the business plan.
- Managing and monitoring performance test plans for all levels of testing.
- Manageing walkthroughs and reviews related to testing and implementation readiness.
- Performance test status reporting.
- Developing performance test scenarios and test scripts.
- Establishing and maintaining performance test strategies for a multi-platform, multi-operating system environment.
- Establishing software performance testing procedures for unit and/or integration testing and regression testing with emphasis on automating the testing procedures.
- Establishing and operating "interoperability" performance testing procedures to ensure that the interaction and co-existence of various software elements, which are proposed to be distributed on the common infrastructure, conform to appropriate departmental standards and have no unforeseen detrimental effects on the shared infrastructure.
- Establishing a validation and verification capability which assumes functional and performance compliance.
- Providing  recommendations, guidance and coordination efforts for test strategies and plans, selection of automated testing tools, and identification of resources required for testing.
- Planning, organizing and scheduling testing efforts for large systems, including the execution of systems integration tests, specialized tests, and user acceptance testing (e.g., stress tests).
- Engaging all performance test activity for a given project.
- Collaborating with project stakeholders to ensure effective performance planning and requirements definition.
- Analyzing performance & business requirements, deliverables, results, etc.
- Assisting in defining the performance parameters of the requirement.
- Performing performance risk analysis and mitigation strategies.
- Ensuring performance test consistency and adherence to organizational practices.
- Building and evaluating quality checkpoints.
- Reviewing, monitoring and summarizing the progress of project testing activities –specifically performance testing
- Reviewing performance testing reports.
- Working with project stakeholders during project definition phase to help the team understand risks, dependencies, and opportunities; participate in requirements definition and review; lend subject matter expertise to projects.
- Developing performance test strategies, test approaches for performance and automation events.
- Providing recommendations and implementing process improvements that will accomplish team, department and business goals.
- Transferring knowledge to to engineers, software developers and Quality Assurance (QA) Testers.

### 5.4.3.2 A.11 - *Tester*

Tasks include, but are not limited to the following:

- Managing walkthroughs and reviews related to testing and implementation readiness.
- Overseeing testing in accordance with the business plan.
- Data Migration and Audit testing.
- Writing and executing software test cases against system requirements,
- Creating automation test cases,
- Finding and reporting bugs
- Creating and maintaining test suites
- Performing system, regression, functional, performance, load and exploratory testing
- Engaging all performance test activity for a given project.
- Collaborating with project stakeholders to ensure effective performance planning and requirements definition.
- Analyzing performance & business requirements, deliverables, results, etc.
- Performance requirement definition.
- Performing performance risk analysis.
- Ensuring performance test consistency and adherence to organizational practices.
- Building and evaluating quality checkpoints.
- Reviewing, monitoring and summarizing progress of project testing activities – specifically performance testing
- Reviewing performance testing reports.
- Active performance testing in all phases of the project defined by the development lifecycle.
- Working with project stakeholders during project definition to help the team understand risks, dependencies, and opportunities;
- participating in requirements definition and review;
- lending subject matter expertise to projects.
- Developing performance test strategies, test approaches for performance and automation events
- Providing recommendations and implementing process improvements that will accomplish team, department and business goals.
- Data Migration and Audit testing.
- Writing and executing software test cases against system requirements,
- Creating automation test cases,
- Finding and reporting bugs
- Creating and maintaining test suites
- Performing system, regression, functional, performance, load and exploratory testing

### 5.4.4 Workstream 4: Technical Services

### 5.4.4.1 A.10 - *Tester*

Tasks include, but are not limited to the following:

- Providing recommendations, and guide coordination efforts for test strategies and plans, selection of automated testing tools to the designated technical staff,
- Planning, organizing, and scheduling testing efforts for designated systems, including the execution of systems integration tests, specialized tests, and user acceptance testing (e.g., stress tests).

- Collaborating with project stakeholders to ensure effective performance planning and definition of future requirements.
- Analyzing business requirements, deliverables, and test results.
- Performing risk analysis.
- Reviewing, monitoring and summarizing progress of project testing activities.
- Reviewing testing reports regarding status of project.
- Performing testing activities in all phases of the project lifecycle.
- Collaborating with project stakeholders during project definition phase to help the team understand risks and dependencies.
- Developing test strategies, test approaches for potential testing automation.
- Providing recommendations on and implementing process improvements.

### 5.4.4.2  B.1 –*Business Analyst*

Tasks include, but are not limited to the following:

- Facilitating working group sessions and conducting interviews with clients to gather their functional and non-functional requirements.
- Documenting requirements for review by different stakeholders (clients, technical staff).
- Consulting with the with Departmental subject matter experts to obtain information on the technical feasibility of system requirements.
- Proposing solutions relating to business process improvements and business procedures;
- Identifying and documenting new business processes.
- Documenting recommendations in the form of mock-ups, use cases/user stories, and schedules .
- Responding to questions from the designers, developers and Quality Assurance Analysts resulting from their review of the business requirements during design, development, and testing phases.
- Attending system walkthrough sessions with the client and developers to validate requirements and to document any requests for functional changes to the solution.
- Drafting User Acceptance Test cases.
- Assisting and participating in User Acceptance Testing of the proposed solution with the client.
- Documenting issues identified in User Acceptance Testing.
- Providing input to the Technical Authority , issues and risk management recommendations.
- Preparing project decks for status reporting to the working group and executive sponsors.
- Validating the developed solution with the requirements and the client.

### 5.4.4.3  B.9 –*Courseware Developer*

Tasks include, but are not limited to the following:

- Performing needs assessment/analysis for training purposes.
- Planning and monitoring training projects.
- Performing job, task, and/or teaching content analysis.
- Writing criterion-referenced, performance-based teaching objectives.
- Providing recommendations on instructional media and strategies.
- Developing performance measurement standards.
- Developing training materials.
- Preparing end-users for implementation of courseware materials.
- Conducting training courses through a variety of mediums, whether on-line, in-class, self-

paced, or other acceptable teaching metholodogies.

- Communicate effectively by visual, oral, and written form with individuals, small group, and in front of large audiences with Departmental employees in a variety of forums and seniority..
- Managing and leading the Courseware Development following Project Management Principles.

### 5.4.4.4 B.14 –*Technical Writer*

Tasks include, but are not limited to the following:

- Working with team resources to determine what type and level of learning related documentation is required (ex : help text, technical documentation, user manuals, web page content and produce technical documentation.)
- Reviewing and evaluating documentation standards and existing project documentation and providing recommendations for improvements.
- Liaising with and gathering features and functions information from other technical resources to clarify all related technical aspects.
- Gathering and assessing end user requirements for the development of documents/manuals and writing/editing required content.
-  Reviewing and verifying the accuracy of technical information provided by internal resources.
- Preparing or providing input in the preparation of any required illustrations and diagrams
- Designing layouts of documents and manuals to provide clarity and logical provision of information.
- Providing usability studies, as requested,  to improve the design of an application that is being developed.
- Utilizing word-processing, desk-top publishing and graphic software packages to produce final copies/camera-ready copies of technical information..

### 5.4.4.5 P.1 –*Change Management Consultant*

Tasks include, but are not limited to the following:

- Analysisng and developing business "critical success factors".
- Analysing and developing architecture requirements design, process development, process mapping and training.
- Guiding functional Resources in defining business strategy and processes in support of transformation and change management activities.
- Participating in change impact analysis and change management activities.
- Participating in organizational realignment (job re-design organizational re-structuring).
- Coordinating development of training and coordination with other stakeholders.
- Creating and presenting to various stakeholders, change management activities
- Presenting to various stakeholders, and facilitating meetings and discussions.
- Providing recommendations on and assisting in implementation of any change management initiatives.
- Identifying and providing recommendations on any project schedule issues
- Providing communication recommendations for distribution internally and outside of the Department.

### 5.4.4.6 P.9 – *Project Manager*

Tasks include, but are not limited to the following:

- Managing several Project Resources, each responsible for an element of the project and its associated project team.
- Managing the project during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters.
- Formulating statements of problems; establishing procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtaining approval from the Technical Authority.
- Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team.
- Reporting progress of the project on an ongoing basis and at scheduled points in the life cycle.
- Meets in conference with stakeholders and other project managers and states problems in a form capable of being solved.
- Preparing plans, charts, tables and diagrams to assist technical staff in analyzing or displaying problems; work with a variety of departmentally defined project management tools.

### 5.4.5    Workstream 5: Project Support Services

### 5.4.5.1 A.1 - *Application/Software Architect*

Tasks include, but are not limited to the following:

- Developing technical architectures, frameworks and strategies, either for an organization entity or for a major application area, to meet the business and application requirements.
- Identifying the policies and requirements that would be defined or require refinement based on a particular solution.
- Analyzing and evaluating alternative technology solutions to meet business problems.
- Ensuring the integration of all aspects of technology solutions.
- Monitoring industry trends to ensure that solutions fit with government and industry directions for technology.
- Analyzing functional requirements to identify information, procedures and decision flows.
- Evaluating existing procedures and methods, identify and document database content, structure, and application sub-systems,
- Developping data dictionary.
- Defining and documenting interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems.
- Defining input/output sources, including detailed plan for technical design phase, and obtain approval of the system proposal.
- Identifying and documenting system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.

### 5.4.5.2 I.11 - *Technology Architect*

Tasks include, but are not limited to the following:

- Overseeing for end-to-end architectural integrity and the related integration with other projects

within the context of the business program.

- Converting business requirements into strategic solutions that address identified business challenges to meet clients specifications or requirements.
- Provide recommendations to identify and translate system requirements into software design documentation.  Assessing the validity of the design based on the requirements.
- Providing recommendations on and evaluating deployment options with a view to risk minimization.
- Ensuring the integration of all aspects of technology solutions.
- Evaluating hardware and software relative to their ability to support specified requirements.
- Evaluating potential and actual bottlenecks to  improve system performance through recommendations.

### 5.4.5.3  P.9 - *Project Manager*

Tasks include, but are not limited to the following:

- Guiding several Project Resources, each responsible for an element of the project and its associated project team.
- Managing the project during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters.
- Formulating statements of problems; establishing procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtaining approval thereof.
- Defining and documenting the objectives for the project; determining budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team.
- Reporting progress of the project on an ongoing basis and at scheduled points in the life cycle.
- Initiatiating meetings with stakeholders and other project managers when required.
- Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of departmentally defined project management tools.
- Providing project sign-off.

### 5.4.5.4  P.10 - *Project Scheduler*

Tasks include, but are not limited to the following:

- Developing and supporting project schedules.
- Developing and maintaining Work Breakdown Structures.
- Producing reports and identifying scheduling and/or dependency issues.
- Conducting and providing critical path analysis.
- Scheduling co-ordination efforts with internal and external project stakeholders.
- Coordinating work efforts with each member of the project(s) team using a results based approach.
- Ensuring the placement of documentation under configuration management as required.
- Reviewing the activities, status and progress with the Technical authority as required.
- Updating and maintaining the integrated master project schedule (and other schedules).
- Identifying implement and process improvement efforts related to scheduling and coordination activities.

## 6.0     DELIVERABLES

The following deliverables are associated with this "Statement of Work" but are not limited to:

- Resources must provide technical advice and the transfer of functional knowledge through the provision of written documents and individual and group training.
- The Contractor must provide the deliverables in draft, final or both forms to the Technical Authority or their representative as specified in each Task Authorization (TA). The scope and specific content of each deliverable will be submitted to the Technical Authority for review and to determine acceptance.
- The final copies of the deliverables must incorporate the comments received and changes requested by the Technical Authority or their representative and will be delivered on or before the end date specified in each TA.
- Each resource must submit a weekly status report to the Technical Authority conforming to the report format specified in each TA.
- The schedule, format and content of each deliverable shall be mutually agreed to by the  Techical Authortiy and the Contractor in writing and will be detailed in the Task Authorization.
- Progress (status) reports. The resource shall prepare a written status and progress reports on the work performed for the project, which is to be attached to the monthly timesheet claim. At a minimum progress reports shall contain the following information:
  - All significant activities performed by the resources during the period,
  - Status of all action/decision items, as well as a list of outstanding activities,
  - A description of any problems encountered which are likely to require the attention of the Technical Authority and any recommendations relating to the conduct of the work.
  - Current milestones with planned dates, progress since last report, issues encountered, and next steps,
  - Hours expended by the Contractor against the task during the reporting period,
  - Highlight the expectations/deliverables for the coming month, week and quarter.
- Progress reports and timesheets must also be included when sending the invoice.
- Project Plans;
- Completed and Unit Tested code;
- System Design Specifications;
- Analysis Documents;
- Completed Releases;
- Requirements Studies;
- Use cases;
- Test plans and scripts;
- Architecture Variance;
- Business Context Models such as Business Use Case (BUC) Models;
- Documented results of Unit, System and Integration Test Plans
- Prototypes / Proof of Concepts
- Presentations/Demos on application code and platform changes
- Preliminary Option Analysis (POA);
- Conceptual System Design (CSD);
- Technical Design Document (TDD);
- Consultation Documentation;
- Initial Project Plans (IPP)technical content;

- Development Strategy;
- Context Strategy;
- Usability Engagement Plan;
- Usability Value and Risk Assessment;
- Business User Model;
- Critical Success Factors;
- Documentation according to DFATD's set of best practices, standards and metholodologies;
- Development of technical design, documentation, and procedures;
- Perform monitoring of query usage and recommend way to modify tables for increased performance (e.g., adding indices, joining tables, adding foreign keys, etc.);
- Costing/Financial reports

## 6.1 Format of Deliverables

All documentation/status reports must be submitted to the Technical Authority by email. Deliverables must be editable in a format compatible with the DFATD's desktop using the Microsoft Office Suite (e.g., Word, Excel, PowerPoint, Project and Visio) currently at version 2007.

## 6.2 Reporting Requirements

The Contractor must produce a daily, weekly and/or monthly status report as required by the Technical Authority, which at a minimum will include the following elements:

a) Accomplishments: All activities completed during the previous period.
b) Planned Activities: All activities planned for the next period.
c) Unplanned Activities: All activities completed which were not planned for the period.
d) Risks, Issues and Mitigation: All risks and issues identified, with probability of occurrence, impact, and measures applied to mitigate the risks.
e) Time Management Report: The amount of time spent on the various project activities.

## GOVERNMENT FURNISHED EQUIPMENT

DFATD will provide the Contractor with access to the following, on an as required basis, for the purpose of completing the work requirements of the contract. It is to be understood that all accesses and privileges, products and services shall be ended or revoked and returned upon completion of the TA..

- Accounts on applicable computer networks and electronic mail system;
- Production workstation;
- Development workstation with sufficient configuration to run software necessary for development, design and/or testing;
- Various application development, testing and requirements management products required to complete scope of work;
- Secure Token to access DFATD computer networks remotely, as required;
- Access to a printer;
- ID card allowing access to building and floor;
- Reference materials, as needed;

## 7. LANGUAGE OF WORK

Work will be performed and delivered in English. All written deliverables must be in English.

**8. LOCATION OF WORK**

Work will be conducted at DFATD sites in the NCR.

**9. CONSTRAINTS**

Work must be done onsite, during a regular work schedule (Monday to Friday, for a 7.5 hour shift between the hours of 7am – 5pm).

**10. TRAVEL REQUIREMENTS**

Travel is not required.

**APPENDIX C TO ANNEX A**

**DRAFT RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE**
**WORKSTREAM 1**

The following Level III mandatory category criteria are provided for information purposes only which will be used to evaluate resources at the Task Solicitation (TS) stage. In solicitations where non Level III resource requirements are sought M1 will be edited accordingly.

| M1 | The Supplier must propose <number> (x) <title> – **Level 3** resource(s) and must demonstrate using project descriptions that the proposed resources have a minimum ten (10) years of experience working as <title> in accordance with the TBIPS Supply Arrangement. | |
|---|---|---|
| M2 | The Supplier must provide at least 2 references from related projects in the last 5 years that can validate the knowledge and experience as an <title> of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.<br><br>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years.  References must be a resources direct supervisor, manager, or director in order to qualify.<br><br>**Referenced projects must be no less than <x> (x) months in duration.** | |
| M3 | The Supplier must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Supplier has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. | |

To facilitate resource assessment, Contractors must prepare and submit a response to a draft Task Authorization using the tables provided in this Appendix. When completing the resource grids, the specific information which demonstrates the requested criteria and reference to the page number of the résumé should be incorporated so that the assessor can verify this information. The tables should not contain all the project information from the resume.  Only the specific answer should be provided.

The point-rated requirements listed herein will be used to create evaluation grids for a proposed resource in the relevant resource category of the Task Authorization process. The Contractor should anticipate that for each Task Authorization request the number of point related criteria could number between 6 to 12 items depending upon the level of resource required.

**1. Programmer/Software Developer – Level 3**

| | **Mandatory Criteria** | **Reference section/page in Supplier's résumé/proposal** | **Meets/Does not meet** |
|---|---|---|---|
| **M4** | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of four (4) years of experience within the last seven (7) years with Oracle BI Publisher integrated with a Siebel application. | | |
| **M5** | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of two (2) years' experience within the last five (5) years, planning, installing, configuring and testing the integration of Oracle Secure Enterprise Search (OSES) with a Siebel application. | | |
| **M6** | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of eight (8) years of experience in Siebel application development within the last twelve (12) years. | | |

| | RATED CRITERIA | MAX POINTS | SCORING | SCORE |
|---|---|---|---|---|
| R1 | The Supplier should demonstrate that the proposed resource has a valid Oracle Siebel certification. A copy of the certification must be provided in the proposal. | /20 | Certification = 20 points | |
| R2 | The Supplier should demonstrate using project descriptions that the proposed resource has experience using Siebel Tools to configure Siebel applications within the last fifteen (15) years. | /20 | Less than 5 years = 0 points<br><br>5 to less than 10 years = 10 points<br><br>10 years and more = 20 points | |
| R3 | The Supplier should demonstrate using project descriptions that the proposed resource has experience in Siebel scripting. | /20 | Less than 5 years = 0 points<br><br>5 to less than 10 years = 10 points<br><br>10 years and more = 20 points | |
| R4 | The Supplier should demonstrate using project descriptions that the proposed resource has experience designing and configuring Siebel workflows. | /20 | Less than 5 years = 0 points<br><br>5 to less than 10 years = 10 points<br><br>10 years and more = 20 points | |
| R5 | The Supplier should demonstrate using project descriptions that the proposed resource has experience designing, developing and testing Siebel user interfaces and/or integration objects for a permit-based issuance application. | /20 | Less than 1 years = 0 point<br><br>1 to less than 3 years = 10 points<br><br>3 years and more = 20 points | |
| R6 | The Supplier should demonstrate using project descriptions that the proposed resource has experience with the requirements management tool Blueprint. | /10 | Less than 4 months = 0 points<br><br>4 months to less than 2 years = 2 points<br><br>2 to less than 3 years = 6 points<br><br>3 years and more = 10 points | |

| R7 | The Supplier should demonstrate using project descriptions that the proposed resource has experience with Team Foundation Server (TFS). | /10 | Less than 4 months = 0 points<br><br>4 months to less than 2 years = 2 point<br><br>2 to less than 3 years = 6 points<br><br>3 years and more = 10 points | |
|---|---|---|---|---|
| **Minimum Passing Mark: = (70%)**<br><br>**(84 out of 120)** | | **/120** | | |

## 2. Programmer/Analyst – Level 3

| | **Mandatory Criteria** | **Reference section/page in Supplier's résumé/proposal** | **Meets/Does not meet** |
|---|---|---|---|
| **M4** | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of six (6) years of experience within the last eight (8) years with .NET application development using Microsoft Visual Studio .NET. | | |
| **M5** | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of four (4) years' experience within the last six (6) years in the development of SQL stored procedures and Transact-SQL queries in a Microsoft SQL Server environment. | | |
| **M6** | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of six (6) years of experience with ASP.NET application development utilizing C#.NET and JavaScript application development. | | |

| | RATED CRITERIA | MAX POINTS | SCORING | SCORE |
|---|---|---|---|---|
| **R1** | The Supplier should demonstrate using project descriptions that the proposed resource has experience in the development of Transact-SQL queries and stored procedures in a Microsoft SQL Server environment. | **/15** | Less than 4 years = 0 points<br><br>4 to less than 5 years = 5 points<br><br>5 to less than 7 years of experience = 10 points<br><br>7 years and more = 15 points | |
| **R2** | The Supplier should demonstrate using project descriptions that the proposed resource has experience in the design and development of enterprise class relational databases. | **/15** | Less than 4 years = 0 points<br><br>4 to less than 6 years of = 5 points<br><br>6 to less than 10 years = 10 points<br><br>10 years and more = 15 points | |
| **R3** | The Supplier should demonstrate using project descriptions that the proposed resource has experience with ASP.NET application development utilizing C#.NET and JavaScript with Microsoft Visual Studio .NET. | **/30** | Less than 6 years = 0 points<br><br>6 to less than 8 years = 10 points<br><br>8 to less than 10 years = 20 points<br><br>10 years and more = 30 points | |

| R4 | The Supplier should demonstrate that the proposed resource has passed exams towards Microsoft Certified Solution Developer (MCSD) or Microsoft Certified Professional Developer (MCPD) certifications. Suppliers must provide proof of completed exams or a copy of the certification in the proposal. | **/5** | 1 point per exam for each of the following:<br><br>70-480, 70-486, 70-487, 70-511, 70-513, 70-515, 70-516, 70-519 up to a maximum of 5 points.<br><br>OR<br><br>5 points will be awarded for full MCSD or MCPD certification. | |
|---|---|---|---|---|
| R5 | The Supplier should demonstrate using project descriptions that the proposed resource has experience in developing public-facing web applications/web sites which are compliant with the Government of Canada Web standards: Common Look and Feel (CLF) Standards 2.0 / Web Content Accessibility Guidelines (WCAG) / Web Experience Toolkit (WET). | **/10** | 1 project = 5 points<br><br>2 or more projects = 10 points | |
| R6 | The Supplier should demonstrate using project descriptions that the proposed resource has experience in developing Web Services (SOAP/XML). | **/15** | Less than 6 years = 0 points<br><br>6 to less than 10 years = 10 points<br><br>10 years and more = 15 points | |
| R7 | The Supplier should demonstrate using project descriptions that the proposed resource has experience developing applications using Microsoft Team Foundation Server. | **/10** | Less than 2 years = 0 points<br><br>2 to less than 5 years = 5 points<br><br>5 years and more = 10 points | |
| R8 | The Supplier should demonstrate using project descriptions that the proposed resource has experience developing web applications using HTML5. | **/10** | 1 project = 5 points<br><br>2 or more projects = 10 points | |

| | | | |
|---|---|---|---|
| R9 | The Supplier should demonstrate using project descriptions that the proposed resource has a minimum three (3) years of experience working with SOAP/XML | /15 | Less than 3 years = 0 points<br><br>3 to less than 5 years = 10 points<br><br>5 years and more = 15 points |
| R10 | The Supplier should demonstrate using project descriptions that the proposed resource has a minimum six (6) years of experience working with HTML/CSS. | /15 | Less than 6 years = 0 points<br><br>6 to less than 8 years = 10 points<br><br>8 years and more = 15 points |
| R11 | The Supplier shoulddemonstrate using project descriptions that the proposed resource has a minimum six (6) years of experience working with JavaScript or Jquery. | /15 | Less than 6 years = 0 points<br><br>6 to less than 8 years = 10 points<br><br>8 years and more = 15 points |
| **Minimum Passing Mark: = (70%)**<br><br>**(108.5 out of 155)** | | /155 | |

### 3. <u>Application/Software Architect – Level 3 – (Siebel Specialty)</u>

| | **Mandatory Criteria** | **Reference section/page in Supplier's résumé/proposal** | **Meets/**<br><br>**Does not meet** |
|---|---|---|---|
| M4 | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of ten (10) years' experience in the architecture, design, and implementation of the Siebel product. | | |
| M5 | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of five (5) years' experience, within the last ten (10) years with the configuration and support of the Siebel product. | | |

| | RATED CRITERIA | MAX POINTS | SCORING | SCORE |
|---|---|---|---|---|
| R1 | The Supplier should demonstrate that the proposed resource has obtained and holds an Oracle Siebel certification. A copy of the certification must be provided in the proposal. | /20 | Certification = 20 points | |
| R2 | The Supplier should demonstrate using project descriptions that the proposed resource has experience integrating Siebel and/or .Net with other applications, such as IBM WebSphere (MQ Series), SAP, etc. | /20 | Less than 5 years = 0 points<br><br>5 to less than 7 years = 5 points<br><br>7 to less than 10 years = 10 points<br><br>10 years and more = 20 points | |
| R3 | The Supplier should demonstrate using project descriptions that the proposed resource has experience translating business requirements into design and the preparation of technical specification documents. | /30 | Less than 5 years = 0 points<br><br>5 to less than 7 years = 10 points<br><br>7 to less than 10 years = 20 points<br><br>10 years and more = 30 points | |
| R4 | The Supplier should demonstrate using project descriptions that the proposed resource has experience designing and developing Siebel and/or .Net user interfaces and/or integration objects for a permit-based issuance application. | /20 | 1 project = 10 points<br><br>2 or more projects = 20 points | |
| R5 | The Supplier should demonstrate using project descriptions that the proposed resource has experience with Team Foundation Server (TFS). | /10 | Less than 2 years = 0 points<br><br>2 to less than 4 years = 5 points<br><br>4 years and more = 10 points | |

| | | | | |
|---|---|---|---|---|
| R6 | The Supplier should demonstrate using project descriptions that the proposed resource has experience with the requirements management solution Blueprint. | **/10** | Less than 2 years = 0 points<br><br>2 to less than 4 years = 5 points<br><br>4 years and more = 10 points | |
| R8 | The Supplier should demonstrate using project descriptions that the proposed resource  has a minimum of five (5) years' experience within the past ten (10) years in participating or leading consultation sessions with Departmental stakeholders to gather business, technical or functional requirements that are required to design business or application solutions.<br><br>***A stakeholder is defined as an individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, program, or portfolio.*** | **/30** | Less than 5 years = 0 points<br><br>5 to less than 7 years = 10 points<br><br>7 to less than 10 years = 20 points<br><br>10 years and more = 30 points | |
| **Minimum Passing Mark: = (70%)**<br><br>**(98 out of 140)** | | **/140** | | |

### 4. <u>Application/Software Architect – Level 3 – ( .Net Specialty)</u>

| | **Mandatory Criteria** | **Reference section/page in Supplier's résumé/proposal** | **Meets/<br><br>Does not meet** |
|---|---|---|---|
| **M4** | The Supplier must demonstrate using project descriptions that the proposed resource has ten (10) years of experience in the architecture, design, and implementation of the .Net product. | | |
| **M5** | The Supplier must demonstrate using project descriptions that the proposed resource  has a minimum of five (5) years of experience within the past ten (10) years participating or leading consultation sessions | | |

| | Mandatory Criteria | Reference section/page in Supplier's résumé/proposal | Meets/ Does not meet |
|---|---|---|---|
| | with Departmental stakeholders to gather business, technical or functional requirements that are required to design business or application solutions. | | |
| M6 | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of five (5) years' experience, within the last ten (10) years with the configuration and support of the .Net product. | | |

| | RATED CRITERIA | MAX POINTS | SCORING | SCORE |
|---|---|---|---|---|
| R1 | The Supplier should demonstrate that the proposed resource has obtained and holds an Oracle Siebel certification. A copy of the certification must be provided in the proposal. | /20 | Certification provided, 20 points will be awarded | |
| R2 | The Supplier should demonstrate using project descriptions that the proposed resource has experience integrating Siebel and/or .Net with other applications, such as IBM WebSphere (MQ Series), SAP, etc. | /20 | Less than 5 years = 0 points<br><br>5 to less than 7 years = 5 points<br><br>7 to less than 10 years = 10 points<br><br>10 years and more = 20 points | |

| | | | |
|---|---|---|---|
| R3 | The Supplier should demonstrate using project descriptions that the proposed resource has experience translating business requirements into design and the preparation of technical specification documents. | **/30** | Less than 5 years = 0 points<br><br>5 to less than 7 years = 10 points<br><br>7 to less than 10 years = 20 points<br><br>10 years and more = 30 points | |
| R4 | The Supplier should demonstrate using project descriptions that the proposed resource has experience designing and developing Siebel and/or .Net user interfaces and/or integration objects for a permit-based issuance application. | **/20** | 1 project = 10 points<br><br>2 or more projects = 20 points | |
| R5 | The Supplier should demonstrate using project descriptions that the proposed resource has experience with Team Foundation Server (TFS). | **/10** | Less than 2 years = 0 points<br><br>2 to less than 4 years = 5 points<br><br>4 years and more = 10 points | |
| R6 | The Supplier should demonstrate using project descriptions that the proposed resource has experience with the requirements management solution Blueprint. | **/10** | Less than 2 years = 0 point<br><br>2 to less than 4 years = 5 points<br><br>4 years and more = 10 points | |
| R8 | The Supplier should demonstrate using project descriptions that the proposed resource has a minimum of five (5) years of experience within the past ten (10) years in participating or leading consultation sessions with Departmental stakeholders to gather business, technical or functional requirements that are required to design business or application solutions<br><br>*A stakeholder is defined as an individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, program, or portfolio.* | **/30** | Less than 5 years = 0 points<br><br>5 to less than 7 years = 10 points<br><br>7 to less than 10 years = 20 points<br><br>10 years and more = 30 points | |

| | Minimum Passing Mark: = (70%) | /140 | | |
|---|---|---|---|---|
| | (98 out of 170) | | | |

## 5. Data Conversion Specialist – Level 3

| | **Mandatory Criteria** | **Reference section/page in Supplier's résumé/proposal** | **Meets/ Does not meet** |
|---|---|---|---|
| **M4** | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of ten (10) years' experience planning, designing and developing data migration processes with a minimum of five (5) years' experience for a large-scale data migration.<br><br>*Large-scale is defined as the migration of data from four or more systems into one single Siebel CRM application involving the migration of a minimum than 50 million records. | | |
| **M5** | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of twenty (20) years' experience as a Data Modeller with a minimum seven (7) years specifically with an Oracle Siebel CRM using Microsoft SQL Server 2008 or above. | | |
| **M6** | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of ten (10) years' experience in data migration activities with a minimum five (5) years specifically with an Oracle Siebel CRM using Microsoft SQL server 2008 or above. | | |

| | Mandatory Criteria | Reference section/page in Supplier's résumé/proposal | Meets/ Does not meet |
|---|---|---|---|
| M7 | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of five (5) years' experience in the design, development, maintenance of data migration processes specifically using Siebel Enterprise Integration Manager (EIM), SQL scripts and SQL Server Integration Services (SSIS) using SSDT-BI Tools. | | |
| M8 | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of ten (10) years of experience with Siebel 7.5 and above. | | |
| M9 | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of ten (10) years of experience using Siebel Tools. | | |

| | RATED CRITERIA | MAX POINTS | SCORING | SCORE |
|---|---|---|---|---|
| R1 | The Supplier should demonstrate using project descriptions that the proposed resource has experience in the design, development and maintenance of Logical Data Models (LDMs) using the AllFusion ERwin Data Modeler tool. | /20 | Less than 5 years = 0 points<br><br>5 to less than 10 years = 10 points<br><br>10 to less than 15 years = 15 points<br><br>15 years and more = 20 points | |

| R2 | The Supplier should demonstrate using project descriptions that the proposed resource has experience in the implementation and management of code tables (i.e. seed data / list of values). | /20 | Less than 5 years = 0 points<br><br>5 to less than 10 years = 10 points<br><br>10 to less than 15 years = 15 points<br><br>15 years and more = 20 points | |
|---|---|---|---|---|
| R3 | The Supplier should demonstrate using project descriptions that the proposed resource has experience using Siebel Enterprise Integration Manager (EIM) to load mass quantities of data into a Siebel database. | /20 | Less than 1 years = 0 points<br><br>1 to 6 years = 10 points<br><br>6 years and more= 20 points | |
| R4 | The Supplier should demonstrate using project descriptions that the proposed resource has experience with SQL Server Integration Services (SSIS) using SSDT-BI. | /10 | Less than 1 year = 0 points<br><br>1 to 5 years = 5 points<br><br>5 years and more = 10 points | |
| R5 | The Supplier should demonstrate using project descriptions that the proposed resource has experience writing SQL scripts. | /20 | Less than 5 years = 0 points<br><br>5 to less than 10 years = 5 points<br><br>10 to less than 15 years = 10 points<br><br>15 years and more = 20 points | |
| R6 | The Supplier should demonstrate using project descriptions that the proposed resource has experience developing and executing data migration validation/verification. | /10 | Less than 1 year = 0 points<br><br>1 to less than 5 years = 5 points<br><br>5 years and more = 10 points | |

| R7 | The Supplier should demonstrate using project descriptions that the proposed resource has experience in Siebel deployments. | /10 | Less than 5 years = 5 points<br><br>5 years or more = 10 points | |
| --- | --- | --- | --- | --- |
| R8 | The Supplier should demonstrate using project descriptions that the proposed resource has experience performing Database Administrator activities/tasks. | /20 | Less than 5 years = 5 points<br><br>5 to less than 10 years = 10 points<br><br>10 to less than 20 years = 15 points<br><br>20 years and more = 20 points | |
| R9 | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of five (5) years' experience using Team Foundation Server (TFS) for defect tracking of bugs/issues and version control. | /5 | Less than 5 years = 0 points<br><br>5 to less than 7 years = 1 points<br><br>7 to less than 8 years = 3 points<br><br>8 years and more = 5 points | |
| R10 | The Supplier should demonstrate using project descriptions that the proposed resource has a minimum of five (5) years' experience using the requirements management tool Blueprint. | /5 | Less than 5 years = 0 points<br><br>5 to less than 7 years = 1 points<br><br>7 to less than 8 years = 3 points<br><br>8 years and more = 5 points | |
| **Minimum Passing Mark: = (70%)**<br><br>**(98 out of 140)** | | **/140** | | |

## 6. Quality Assurance Specialist/Specialist – Level 3

| | Mandatory Criteria | Reference section/page in Supplier's résumé/proposal | Meets/ Does not meet |
|---|---|---|---|
| M4 | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of eight (8) years experience related to developing, documenting, and executing test plans, test strategies, test scripts and/or test cases for Siebel CRM applications. | | |
| M5 | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of five (5) years experience within the past ten (10) years in using automated testing software and other packages or custom built testing tools to simulate the executing of system and application tests. | | |

| | RATED CRITERIA | MAX POINTS | SCORING | SCORE |
|---|---|---|---|---|
| R1 | The Supplier should demonstrate using project descriptions that the proposed resource has experience testing Siebel based applications. | /25 | Less than 4 months = 0 points<br><br>4 months to less than 3 years = 5 points<br><br>3 to less than 8 years = 10 points<br><br>8 years and more = 25 points | |

| R2 | The Supplier should demonstrate, using project descriptions, that the proposed resource has experience testing .NET applications. | /25 | Less than 4 months = 0 points<br><br>4 months to less than 3 years = 10 points<br><br>3 to less than 8 years = 15 points<br><br>8 years and more = 25 points | |
|----|----|----|----|----|
| R3 | The Supplier should demonstrate using project descriptions that the proposed resource has experience testing interfaces between Siebel applications and non-Siebel platforms. | /20 | Less than 4 months = 0 points<br><br>4 months to less than 3 years = 5 points<br><br>3 to less than 8 years = 10 points<br><br>8 years and more = 20 points | |
| R4 | The Supplier should demonstrate using project descriptions that the proposed resource has experience with Siebel builds and migrations. | /20 | Less than 4 months = 0 points<br><br>4 months to less than 3 years = 5 points<br><br>3 to less than 8 years = 10 points<br><br>8 years and more = 20 points | |
| R5 | The Supplier should demonstrate using project descriptions that the proposed resource has experience with the requirements management tool Blueprint. | /5 | Less than 4 months = 0 points<br><br>4 months to less than 2 years = 1 point<br><br>1 to less than 3 years = 3 points<br><br>3 years and more = 5 points | |
| R6 | The Supplier should demonstrate using project descriptions that the proposed resource has experience with Team Foundation Server (TFS) Test Manager to execute and track test cases, and defects. | /5 | Less than 4 months = 0 points<br><br>4 months to less than 2 years = 1 point<br><br>1 to less than 3 years = 3 points<br><br>3 years and more = 5 points | |

| | Minimum Passing Mark: = (70%) (70 out of 100) | /100 | | |
|---|---|---|---|---|

### 7. Application / Software Architect – Level 3

| | **Mandatory Criteria** | **Reference section/page in Supplier's résumé/proposal** | **Meets/ Does not meet** |
|---|---|---|---|
| **M4** | The Supplier must demonstrate using project descriptions that the proposed resource has a minimum of five (5) years' experience designing, configuring and implementing business applications making extensive use of or integrated with a commercial Client Relationship Management (CRM) type product. | | |

| | **RATED CRITERIA** | **MAX POINTS** | **SCORING** | **SCORE** |
|---|---|---|---|---|
| **R1** | The Supplier should demonstrate using project descriptions that the proposed resource has experience analyzing and solving problems within a complex Microsoft (MS) Windows Server (2008 or higher) environment. | /30 | Less than two years = 0 points<br><br>2 years to less than 5 years = 10 points<br><br>5 years to less than 10 years = 15 points<br><br>10 years and more = 30 points | |
| **R2** | The Supplier should demonstrate, using project descriptions, that the proposed resource has experience analyzing, troubleshooting, and solving Siebel (version 7x or higher) issues. | /30 | Less than two years = 0 points<br><br>2 years to less than 5 years = 10 points<br><br>5 years to less than 10 years = 15 points | |

| | | | | |
|---|---|---|---|---|
| | | | 10 years and more = 30 points | |
| R3 | The Supplier should demonstrate using project descriptions, that the proposed resource has experience clustering Siebel using Microsoft Clustering. | /20 | Less than one year = 0 points<br><br>1 year to less than 2 years = 10 points<br><br>2 years to less than 5 years = 15 points<br><br>5 years and more = 20 points | |
| R4 | The Supplier should demonstrate using project descriptions, that the proposed resource has experience load balancing Siebel using either Siebel native or hardware solutions. | /20 | Less than one year = 0 points<br><br>1 year to less than 2 years = 10 points<br><br>2 years to less than 5 years = 15 points<br><br>5 years and more = 20 points | |
| R5 | The Supplier should demonstrate using project descriptions, that the proposed resource has experience installing, configuring and administering Oracle BI Publisher. | /5 | 1 to 2 projects = 1 point<br><br>3 to 5 projects = 3 points<br><br>6 or more projects = 5 points | |
| R6 | The Supplier should demonstrate using project descriptions, that the proposed resource has experience automating install processes. | /5 | 1 to 2 projects = 1 point<br><br>3 to 5 projects = 3 points<br><br>6 or more projects = 5 points | |
| **Minimum Passing Mark: = 77 (70%)**<br><br>**(77 out of 110)** | | **/110** | | |