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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.

Comments - Commentaires

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

Issuing Office - Bureau de distribution

Special Projects Division (SPD)/Division de Projets Spéciaux (DPS)
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Gatineau
Québec
K1A 0S5

Title - Sujet Business Partner Services	
Solicitation No. - N° de l'invitation U8210-199175/A	**Amendment No. - N° modif.** 003
Client Reference No. - N° de référence du client U8210-199175	**Date** 2020-01-24
GETS Reference No. - N° de référence de SEAG PW-$$XU-002-37089	
File No. - N° de dossier 003xu.U8210-199175	**CCC No./N° CCC - FMS No./N° VME**
Solicitation Closes - L'invitation prend fin **at - à** 02:00 PM **on - le** 2020-03-03	**Time Zone** **Fuseau horaire** Eastern Standard Time EST
F.O.B. - F.A.B. Specified Herein - Précisé dans les présentes **Plant-Usine:** ☐ **Destination:** ☐ **Other-Autre:** ☑	
Address Enquiries to: - Adresser toutes questions à: Belcaid, Sidi M.	**Buyer Id - Id de l'acheteur** 003xu
Telephone No. - N° de téléphone (613) 204-9619 ( )	**FAX No. - N° de FAX** ( ) -
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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

THIS SOLICITATION AMENDMENT NO. 003 IS RAISED TO:

A. Respond to questions received from suppliers; and
B. Amend the RFP.

PART A: QUESTIONS AND ANSWERS

Question #008

Reference: General
Question #008: With respect to the collaboration with the CDS and IPRMS Technology Partners, does Canada envision the "Business Partner" issuing Task Authorizations directly to the Technology Partners?
Answer #008: No, the Business Partner will not issue Task Authorizations directly to the Technology Partners. ISED will issue Task Authorizations to the Technology Partners and the Business Partner.

Question #009

Reference: General
Question #009: Could Canada describe the software and related technologies (i.e. hardware, cloud) that are currently in use at CIPO to deliver services to clients? Additionally, have any decisions been made on the future software and related technologies as part of the CIPO IT Modernization initiative? This information will better position us to: 1. Assess the IT vendor/product skills that CIPO will require within the IM/IT personnel categories identified in the RFP; and 2. Accurately price the personnel categories, based on the skills required.
Answer #009: 1. The information below provides a brief description of the technical environment for managing the case and workflow of Patents, Trademarks and Copyrights and Industrial Designs. **PATENTS Case and Workflow** **(a) The Core Application** TechSource, the case and workflow application for Patents was put into production in 1996. It handles electronic processing of patent applications from filing through to registration and maintenance to renewal

thereafter. The TechSource core system was developed by CGI, and the integration to Text processing, Content Management and Reporting was developed by IBM. The batch processing was implemented by IBM and the software that executes in batch is a combination of logic developed by CGI and IBM.

(b) Peripheral TechSource Applications

Shortly after TechSource went live, CIPO began to introduce satellite applications for functionality that were not readily available on TechSource such as image manipulation processes for publishing preparation. Several of the satellite applications that were built were managed by CIPO as one-off side projects using various contracted developers.

(c) InterApp

InterApp, a stand-alone case and workflow application for international patents was put into production in 2004. It stands alone in that the Patents come from WIPO, are examined, and then are sent back to WIPO. InterApp is not part of the Canadian legislative system, though is mentioned here because it deals with Patent subject matter and it is maintained by the team that support TechSource.

(d) Evolution of TechSource

TechSource and its satellite applications have been maintained over the past twenty years of constant Patent legislative changes and process enhancements. There have been several past projects which have accommodated a scope to simplify and streamline processes. Beginning in 2005, when new capabilities were required to be added, a modern Service Oriented Architecture approach has been followed and modern technologies have been used. However, a replacement system for TechSource has always been on the horizon and so the amount of core functionality that was permitted to be included in project funding was kept to a minimum. Therefore, although the newer functionality that has been added since 2005 is very modern and exceedingly well done, the core legislative functionality is using the same methods, technology and logic that were used when TechSource was first built.

(e) Technologies

The following technologies are used for the core application and the additional subsystems or components:

(i) CAGen (formally known as Advantage Gen): It is a 4th GL software generation tool that was originally used by CGI to develop the core legislative system of TechSource. CGI used CAGen to generate the TechSource LOB system in COBOL (though it is capable of generating code in various other languages);

(ii) COBOL and CICS on the Z/OS: The TechSource core LOB system is generated as COBOL and deployed to the Z/OS. The COBOL on the Z/OS is a mix of CAGen generated code and also hand-written COBOL that had originally been developed by IBM;

(iii) DB2: The DBMS which is used by TechSource is supported by IBM and hosted by Shared Services Canada;

(iv) Java environment: All of the Service Oriented Architecture components that have been introduced to TechSource since 2005 have been developed in Java;

(v) C++: Several of the peripheral applications of TechSource that had been developed before 2005 including InterApp were developed in C++; and

(vi) CM8: The image or content engine of TechSource which resides on the Unix System Services of the Z/OS DB2 is used as the DBMS for CM8 on Z/OS. Our application software communicates with CM8 via Java APIs.

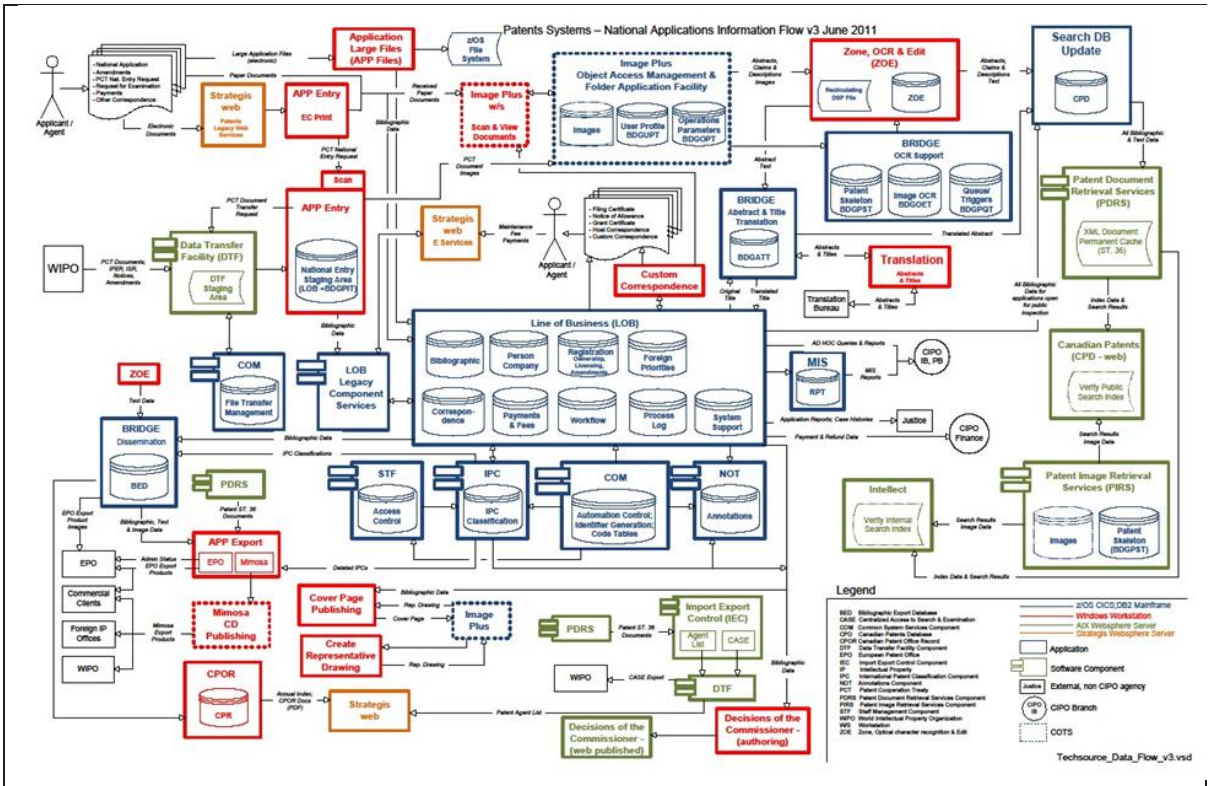

Figure 1 - TechSource Data Flow

TRADEMARKS Case and Workflow

(a) The Core Application

INTREPID, the case and workflow application for Trademarks was put into production in 1996. It handles electronic processing of trademark applications from filing through to registration and maintenance and renewal thereafter. This includes the processing of any Opposition proceeding handled by the Trademark Opposition Board (TMOB). The core INTREPID system has been maintained and upgraded over time and additional subsystems or components have been added as business requirements have evolved. While the processing of trademark applications appears to be a fairly straight forward workflow type of process, the process and all legislatively controlled business rules have combined to make a complex solution.

(b) Technologies

The following technologies are used for the core application and the additional subsystems or components:

(i) Oracle 11g is the database software used throughout the solution;
(ii) Centura is a 4th GL software environment used for the TMB/TMOB internal user interface. This software is similar to the better known equivalent PowerBuilder;
(iii) COBOL is used for backend batch programming using the MicroFocus COBOL compiler;
(iv) Java environment: all electronic commerce and the new components have been developed in the Java environment; and
(v) Supporting technology components: as with most full environment solutions there are several supporting technology components performing additional functionality around the core system. For INTREPID this includes JetForm, Adobe Reader, MS Office, NFS Solo (currently being refactored

out with Samba as a replacement) as well as the operating environments (Windows 7, Unix) that the solution runs on.

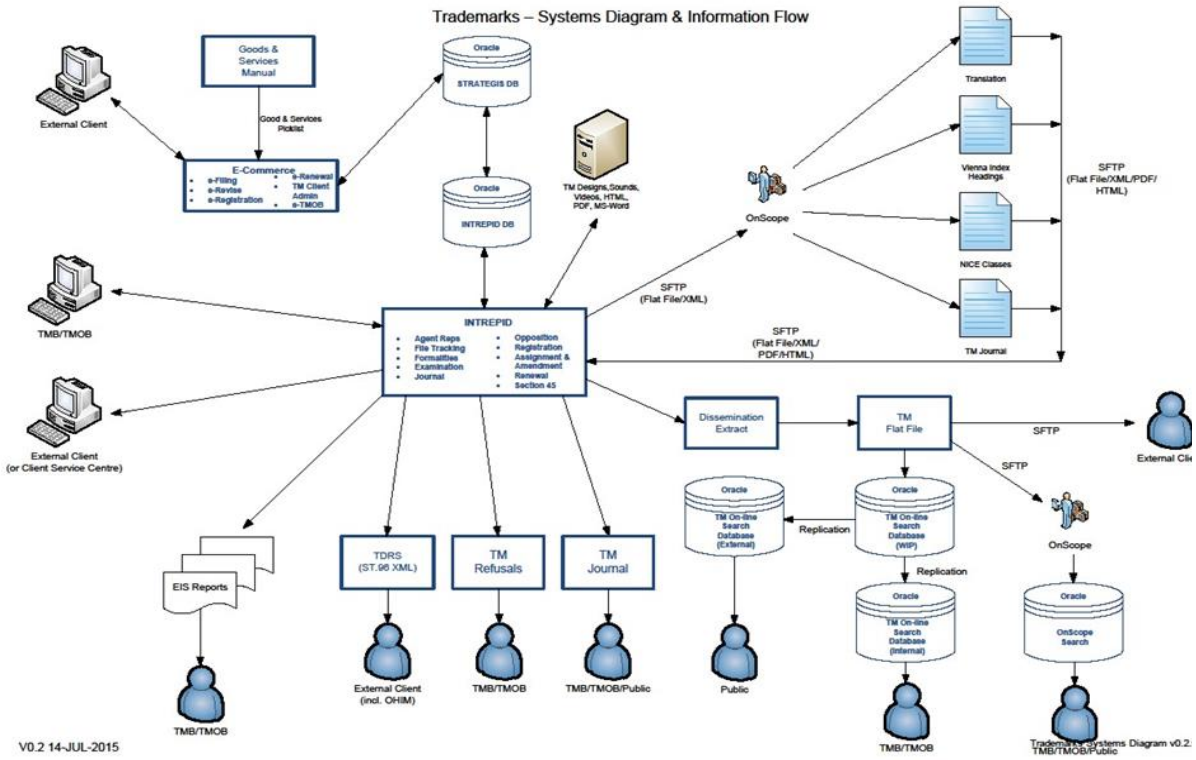

Figure 2 - INTREPID Data Flow

COPYRIGHTS AND INDUSTRIAL DESIGNS Case and Workflow

(a) The Core Application

Creation and DesignPlus, the case and workflow application for Copyright and Industrial Designs was put into production in 2002. The core applications were developed in-house using Oracle as the Relational Database Management System (RDBMS) and Oracle Forms as the user interface. Oracle PL/SQL is used to drive batch processes. Oracle Reports is used to produce reports via Oracle's SQL Report Writer (SRW) combined with PL/SQL. For content and documents, Creation and DesignPlus use an in-house developed means of storing documents on a UNIX-based file system (currently using NFS solo and soon to be replaced with Samba installed on the server) using a tree-directory structure. An enhancement to document capabilities was recently introduced using Java beans.

(b) Technologies

The following technologies are used for the core application and the additional subsystems or components:

(i) Oracle Forms is the User Interface of Creation and DesignPlus and enables the user to interact with the data that is stored in the Oracle database as well as the images and documents which are stored on the UNIX-based filesystem. Oracle Forms requires release level upgrades from time to

time such as when the operating system is upgraded. Oracle Forms was originally at release 6 and has progressed over time to Oracle Webforms;

(ii) Oracle RDBMS is the relational database management system used by DesignPlus to store data. We are currently at version 11G. ISED keeps each Oracle environment in sync with the latest release levels via planned rollouts;

(iii) Oracle PL/SQL is used to manipulate or process data and is used to drive batch processing;

(iv) Oracle Reports and SRW are used to produce and format reports;

(v) MS Word is used to produce correspondence;

(vi) KOFAX is used to scan documents and also performs Optical Character Recognition to derive textual data from the images;

(vii) A UNIX-based filesystem is used through NFS Solo as a repository for documents. An in-house written tree structure is used to store and navigate through the document tree structure. There are plans to replaces the NFS Solo software with SAMBA;

(viii) Java Beans are used to enhance image display capabilities; and

(ix) Java is being introduced as a means to process XML data to and from WIPO.

2. Canada has not made any decisions on the future software and related technologies as part of the CIPO IT Modernization initiative. The intent is to work with the Business and Technology Partners, to perform an environmental scan, identify viable options, develop a target solution and then implement a solution that adheres to GC guidelines and regulations.

PART B: RFP REVISIONS

No revision has been made to the RFP as a result of this Solicitation Amendment.

ALL OTHER TERMS AND CONDITIONS OF THE BID SOLICITATION REMAIN UNCHANGED.