

RPA Solution Survey Feedback

Challenge-Based Solicitation (CBS)

Solicitation No.: 2BS-1-91027



July 26th, 2021



Objective and Preamble

The purpose of this presentation is to:

- Share vendor survey results on the CBSOS requirements.
- Provide rationale on why some requirements will require modifications, clarifications or be completely removed
- The updates will be reflected in the Solicitation No.: 2BS-1-91027, Challenge-Based Solicitation (CBS) for a Robotic Process Automation (RPA)

Executive Summary



Surveys received: 10

Date Range: June 24th, 2021 – July 2nd, 2021

- 60 individual written feedback comments

Total Requirements: 82

- We asked vendors to revise 59 requirements on the survey

90%(53) of *survey requirements* were deemed adequate, out of which there are 4 where we are:

- providing further clarification

10%(6) of *survey requirements* were interpreted by respondents as being ambiguous and for those requirements we:

- anticipate changing the text: 4
- foresee dropping the requirement: 2

Summary of Requirement Categories and Changes

Requirement Categories:

- AD Environment (AD)
- BOT Execution (BOT)
- Comprehensive Console (OCPG)
- Deployment and Operation (ENV)
- Non Functional (NAF)
- Capabilities to Augment Automation (CAA)
- Reports and Dashboards (RD)
- Security requirements (SEC)
- Integration and Interaction (INT)

Further clarification (total 6)

- BOTLM1
- ENV 1, ENV 7
- NAF – PMD2
- CAA11

Anticipating changes to text (total 3)

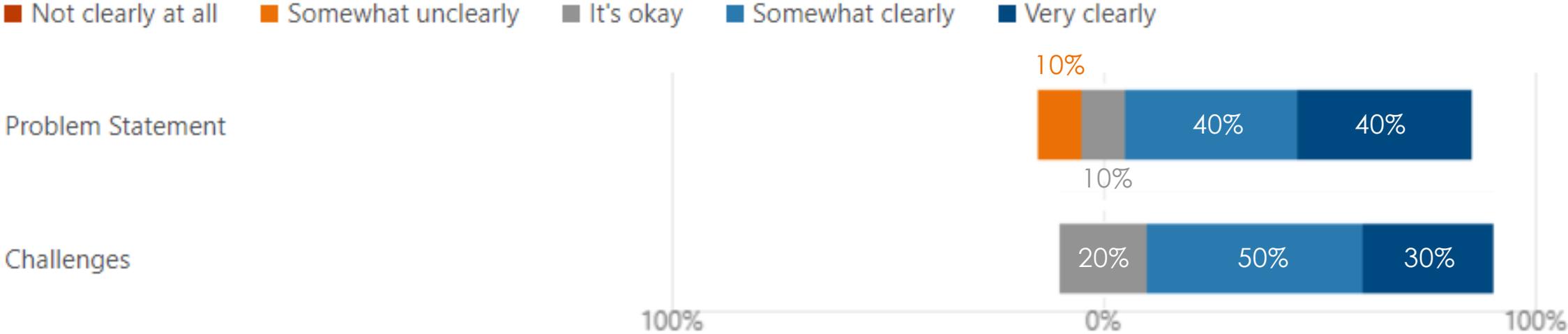
- BOT-A3
- OCPG
- ENV5

Dropping requirement (total 2)

- CAA3
- CAA4

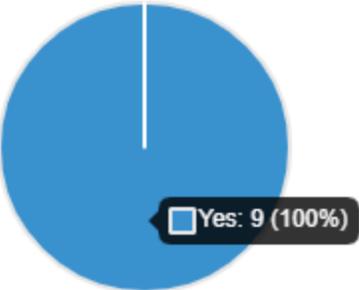
Problem Statement and Challenges

Based on CBSOS solution survey results, there was a good acceptance on the overall problem statement and challenges components within the CBSOS.

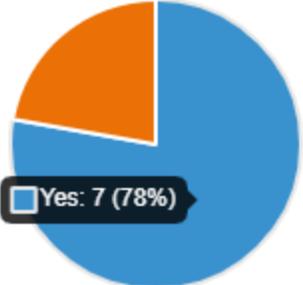


Accessibility

All individuals have responded that their solution is accessible in both French and English as this was very crucial for Canada. There are a few that did say that their solution is not fully accessible when it comes to assistive technology, we will need to assess these solutions in more details and compare them with Canada and WCAG 2.1 guidelines.



Solution Accessible in English and French

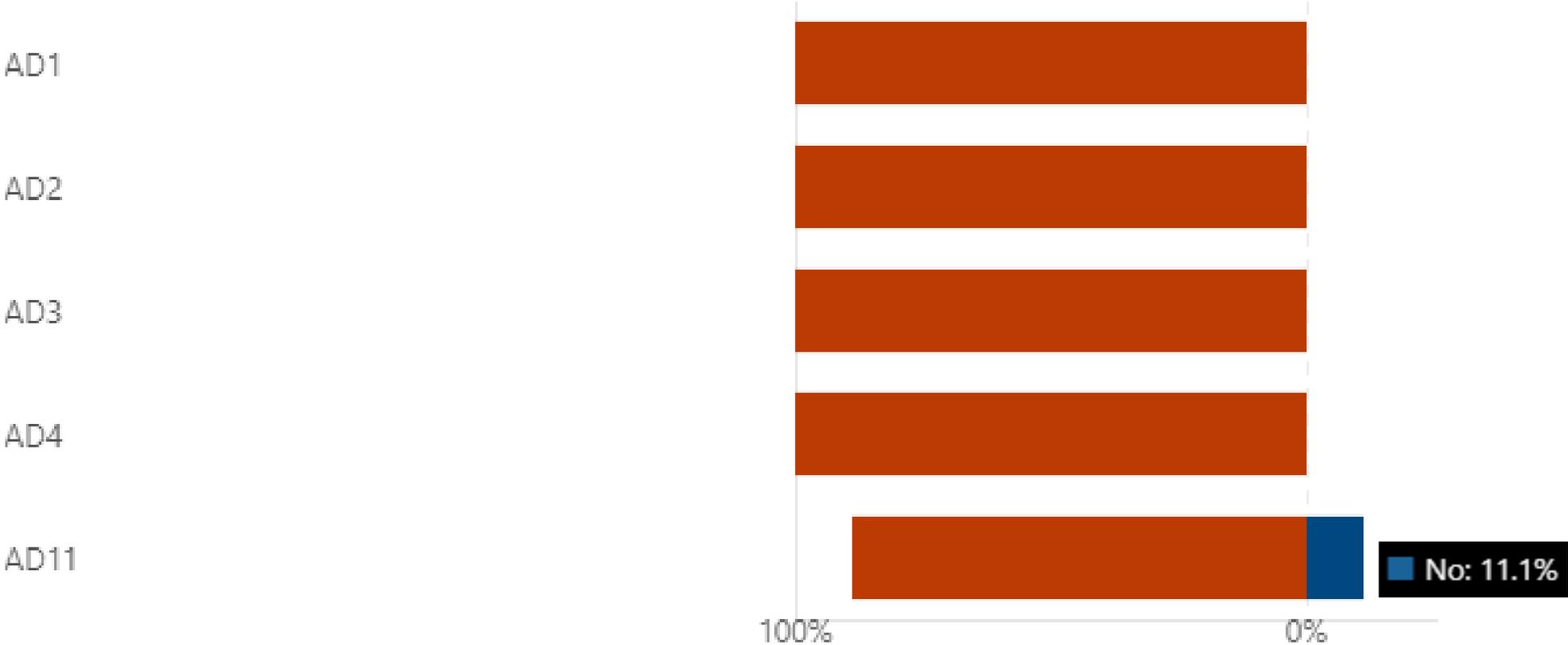


Solution Accessible in Assistive Technology

AD Environment Requirements

Most of the AD environment requirements were well understood and there are currently no changes or clarifications required

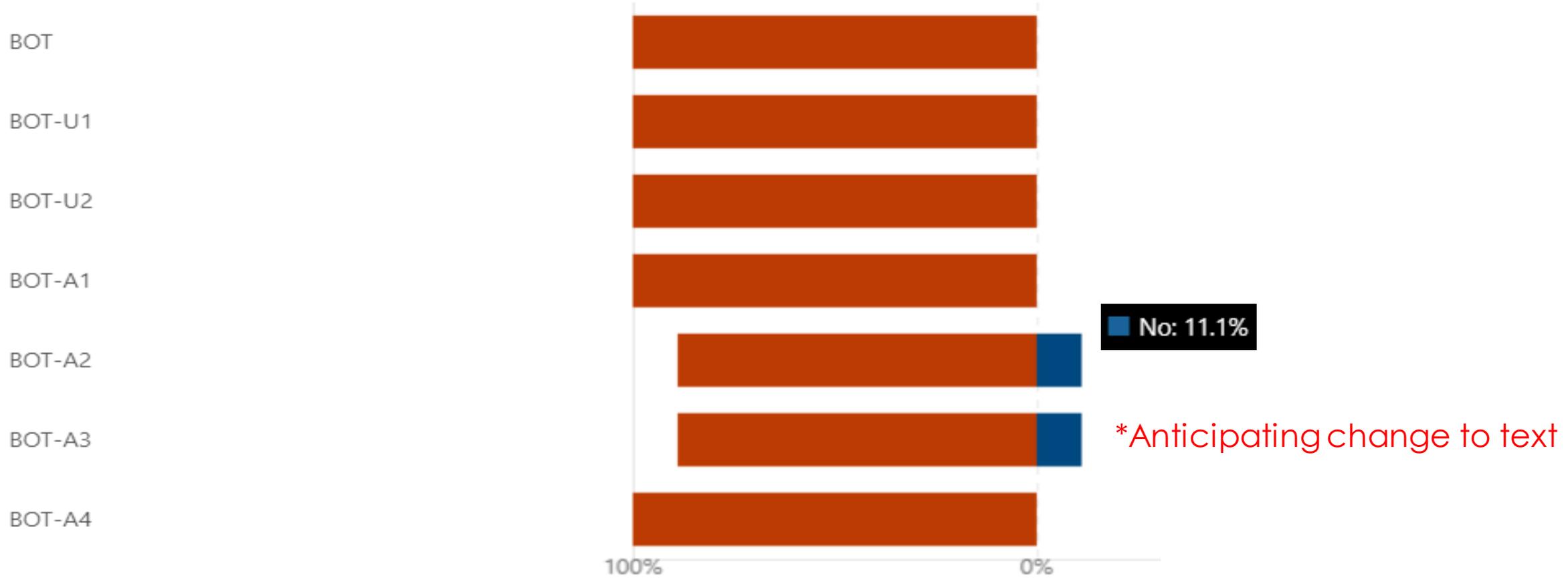
Yes No



BOT Executions Requirements

Most of the BOT execution requirements were well understood, although we are anticipating a change in BOT-A3 text to provide more guidance on the request

Yes No



BOT Executions Requirements CONT.

BOT-A3: The solution must be able to monitor active BOT workflow processes.

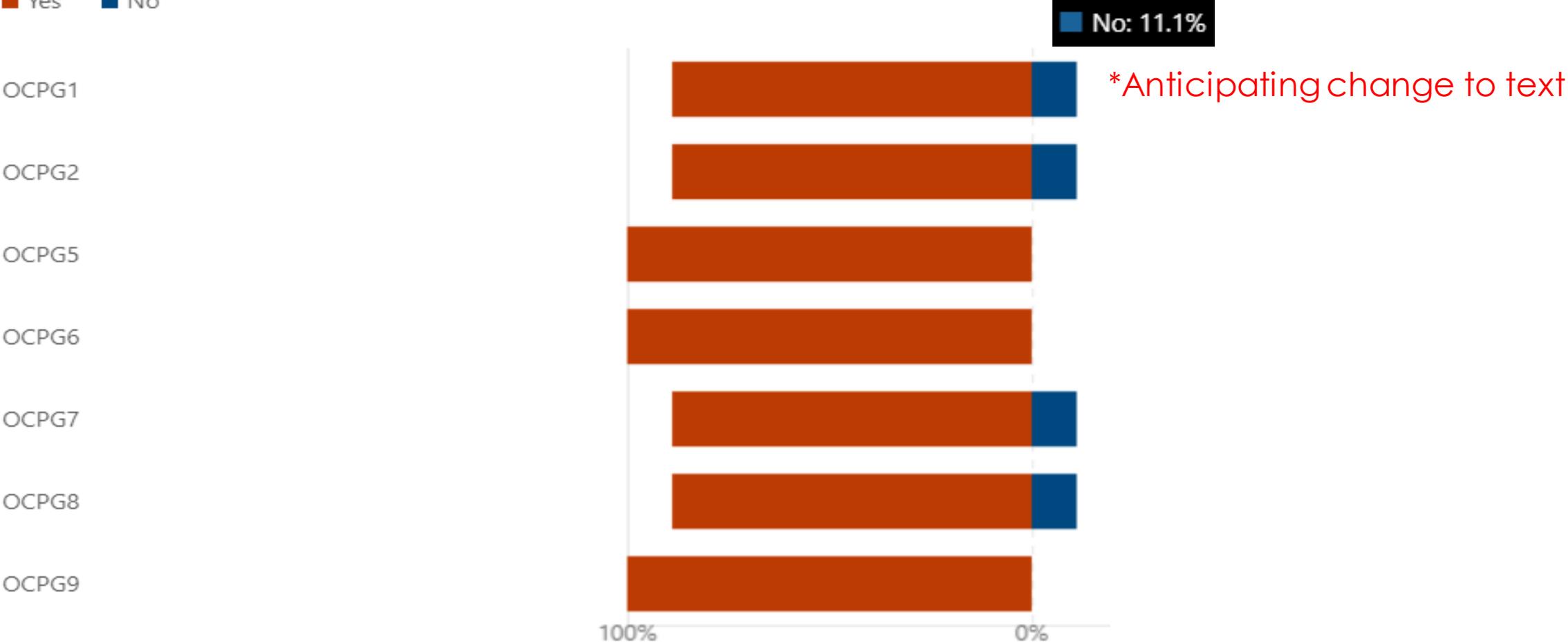
Anticipating to change the text to the following:

- The solution must be able to provide insights on active bot workflow processes for the CoE or the operations team.

OCPG Requirements

Most of the comprehensive console requirements were well understood, although we are anticipating a change in OCPG1 to provide more guidance on the request

Yes No



OCPG Requirements CONT.

OCPG1: The workflow must be scheduled by the developer to run multiple times during the day on various environments to show multi tenancy

Anticipating to change the text to the following:

- The orchestrator or control panel must be able to task multiple digital workers or bots to the same workflow or process.

BOT Lifecycle Management Requirements

There were a few questions and concerns in regards to BOTLM1, further clarification will be sent to Vendors to better understand the requirement.

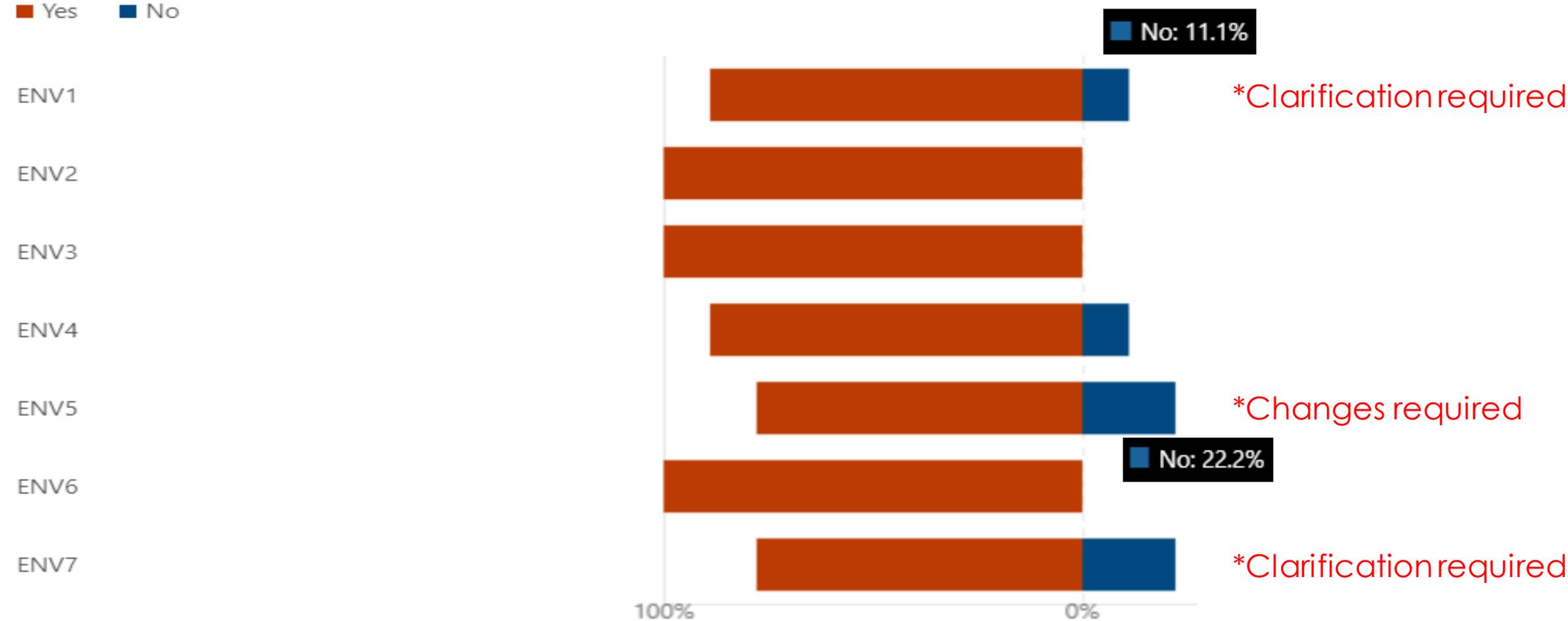


BOTLM1: The BOTLM must be able to queue updates to unattended workflows in production to allow for review and acceptance prior to implementation.

Clarification: In a large organization and in an operation scenario, the solution must be able to provide a framework around the development lifecycle for new workflows or updating existing workflows. For example, the ability to limit development to a group of users, and the capability to move new workflows in and out of production.

ENV Requirements

There are a few changes and clarifications on Deployment and Operating environment requirements for better understanding.



ENV Requirements CONT.

ENV1: The solution must be deployable in Government of Canada infrastructure datacenters, private cloud, and public cloud.

Clarification: In the solution survey feedback, some participants requested additional information for the Government of Canada Cloud Solutions. For your convenience and information, please review the [Government of Canada Cloud Adoption Strategy: 2018 update](#) and the [GC Cloud Brokering Providers](#).

ENV5: The solution must meet FedRamp and PCI security standards and certifications.

We are considering changes to this requirement: PCI Security, Protected A/B aligned with Canadian Standards, like [ITSG-33](#) or [Appendix J](#) from Treasury Board. Please keep up to date on Buy and Sell.

ENV7: The solution must be able to set minimum and maximum settings for workload capacity.

Clarification: The number of digital workers (or bots) assigned to run workflows must have resource flexibility, set scaling options or thresholds. The settings need to include a minimum and maximum for digital workers (or bots) assigned to a particular workflow or process so that the resources can increase or decrease dynamically. We anticipate changing the wording from “workload capacity” to “workload management”. Please keep up to date on Buy and Sell.

NAF Requirements

Yes No

NAF1-BOT

NAF2

NAF3

NAF4

NAF7-SEC

NAF9-BOT

NAF10-SEC

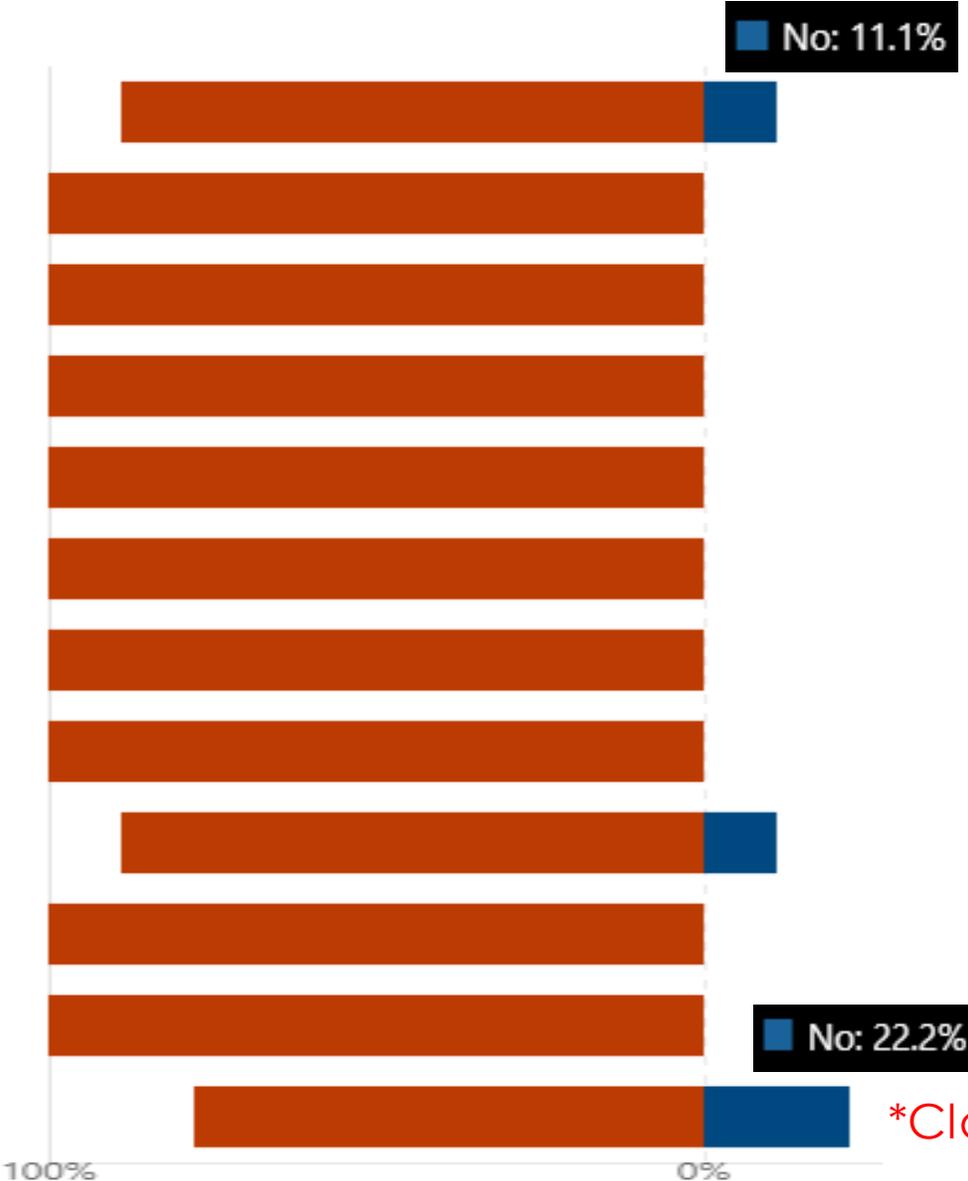
NAF11-ENV

NAF-ENV8b

NAFBOT11

NAF-PMD1

NAF-PMD2



*Clarification required

ENV Requirements CONT.

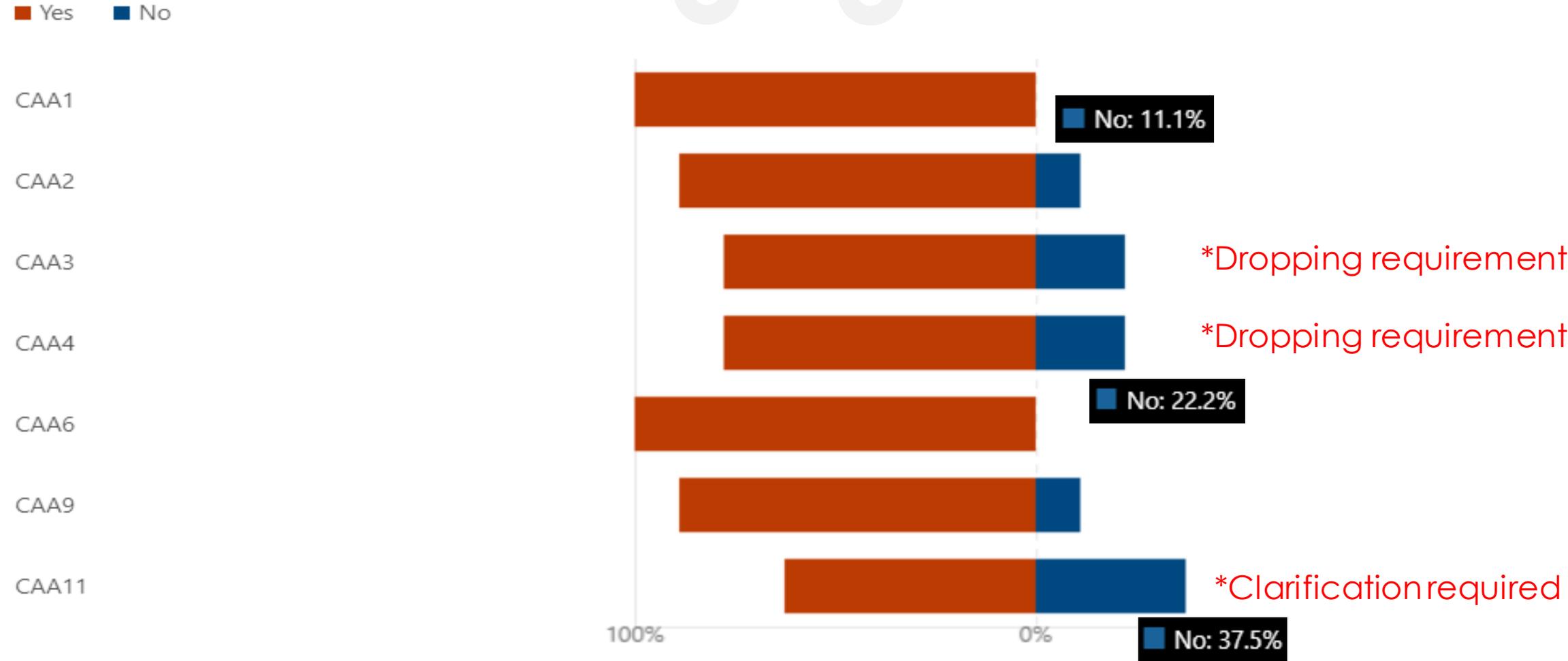
NAF-PMD2: The solution must have predictive analysis, prescriptive analysis, scenario testing and simulation for process automation.

Clarification:

- NAF are not part of the minimum requirements but should assist you or provide guidance on features that might be desirable for other government departments (OGD) for this standing offer. NAF can be used as differentiators for assessment purposes in this standing offer.

CAA Requirements

Lots of concerns were raised in Capabilities to Augment Automation requirements, we are anticipating to drop some requirements and provide more clarifications for better understanding.



CAA Requirements CONT.

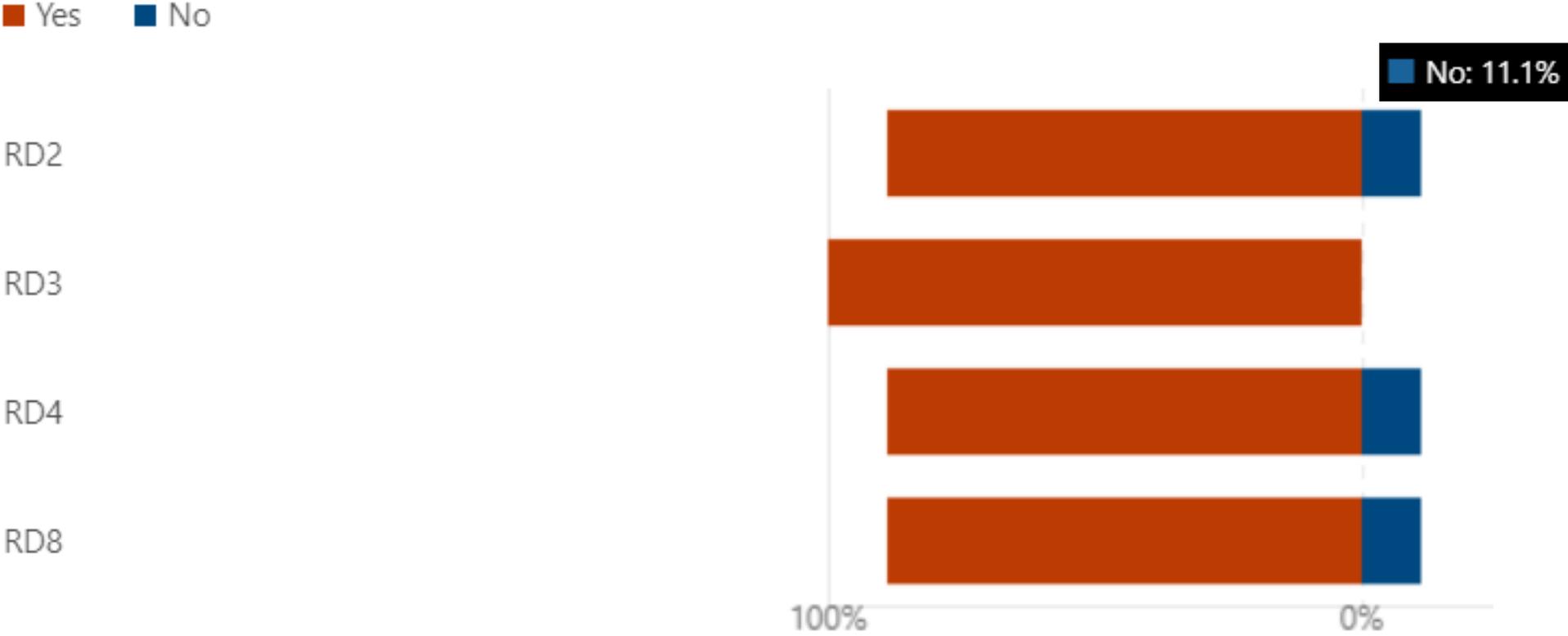
CAA3: The solution must be able to use workflows for supervised and unsupervised training of ML models.
We are anticipating dropping this requirement. Please keep up to date on Buy and Sell.

CAA4: The solution must not extract training data from ML models.
We are anticipating dropping this requirement. Please keep up to date on Buy and Sell.

CAA11: The solution must be able to use prior versions of AI / ML models.
Clarification: TBS policies require that when “AI” is used in automated decision-making systems, we must maintain the ability to use any prior model on demand. The ML model is required for audit and review purposes. For this reason, we specify that if a software solution is involved in building, supplying, and training its own internal models, we request that the version history be maintained and ability to rollback versions is readily available for the end user. Additional information can be found on [Treasury Board’s Website](#) under section 6.2.

RD Requirements

No changes to Reports and Dashboards requirements



SEC Requirements

No changes to Security requirements

■ Yes ■ No



INT Requirements

No changes to Integration and Interaction requirements

■ Yes ■ No

INT3

INT4

INT5

INT6

