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FORM N: PROPONENT PROPOSAL - REQUIREMENTS

Instructions for filling out Form N: Proponent Proposal - Requirements

1. Complete Form N: Proponent Proposal - Requirements
2. Follow the proposal instructions in the Proposal Instructions section below

PROPOSAL INSTRUCTIONS

1. **For each Mandatory requirement, provide a Y (Yes) or N (No), indicating whether your solution can meet the requirement.** Y indicates that the solution you are proposing will meet the requirements listed in the requirement statement. N indicates that the solution you are proposing will not meet the requirements.
2. **For each Non-Mandatory requirement indicate which Proponent response code that best describes your solution:**

Y – Available Out of the Box: the solution for the requirement is currently available in the existing product “out of the box”. Configuration may be required to enable the feature (requirement will be met through changes to settings of tables, switches, and rules without modification to the source code). Requirement is installed and operational at other sites and can be demonstrated to the City of Winnipeg.

C – Available via Customization: the solution for the requirement is not currently available in the existing product “out of the box”, but may be incorporated via customization of the solution components. Requirement will be met through changes to the source code which would require analysis and re-application during updates, upgrades, or when applying software patches.

F – Future Availability: the solution for the requirement is not currently available, but will be available in an upcoming planned product release. If this option is indicated, include the date/timeframe when the requirement will be available for implementation, which should be either:

- a) A planned release up to 3 calendar months after the RFQ xxx-2016 competition close date, where an additional Proponent response code of **3** should be provided;
- b) A planned release up to 6 calendar months after the RFQ xxx-2016 competition close date, where an additional Proponent response code of **6** should be provided, or
- c) A planned release up to 12 calendar months or longer after the RFQ xxx-2016 competition close date, where an additional Proponent response code of **12** should be provided.

3 – Third Party Supplied: the solution for the requirement is expected to be met by using a third party vendor’s existing product, either integrated or non-integrated.

N – Not Possible: the solution for the requirement will not be provided by the Proponent.

Notes:

1. An omitted response will be assumed to be the same as a response code of “N”.
2. Any deviation from the response code will be re-coded at the discretion of the City of Winnipeg.

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A. Mandatory Requirements				Proponent Response (Y, N)
A1. General Requirements				
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Must enable Decision Makers to use ECM to retrieve the right information from the right documents, when they need it.	Automation	(Section 7.1)	R1	
Must automate high impact and high profile business processes that feed information to management, Council and the public.	Automation		R2	
Must enable Business Owners to set the standards of use for the system. (e.g. retention policies, document types, metadata, search criteria, access security roles).	Automation		R3	
Must control the versions of documents/records in order to help identify final and correct versions.	Automation		R4	
Must assist definition and enforcement of access controls to protect City information assets and comply with legislation and policy.	Automation		R5	
Must assist with establishing and maintaining consistent Access and Security Controls.	Automation		R6	
Must offer the full feature set of a client-based solution through a web deployable interface (i.e. rich internet application).	Web Client Interface	(Section 7.2)	R7	
Must support Web Client to provide a dashboard component to create and manage personalized interfaces that present end users with access to priority content and tasks (e.g., workflow status report, commonly used document searches).	Web Client Interface		R8	
Must describe how core search and retrieval client allows users to search for multiple document types (e.g., text/COLD, image, PDF, Word, etc.) in one search.	Search Experience		R9	
Must eliminate manual ECM and records management tasks such as uploading and indexing files.	Document Management	(Section 7.3)	R10	
Must enforce disciplined records management.	Document Management		R11	

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A. Mandatory Requirements				Proponent Response (Y, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Must support the destruction of records so that they cannot be reconstructed.	Document Management		R12	
Must support automatic deletion process for documents not declared as records.	Document Management		R13	
Must maintain a record of all records destroyed including all attached metadata.	Document Management		R14	
Must support all incoming Admin records have a True Document Date as part of required metadata in order to support disposition.	Document Management		R15	
Must enable easy search and utility to make information more useful.	User Interface		R16	
Must support documents to be added to a workflow in several different ways including: <ul style="list-style-type: none"> • Scanning • Enterprise text report processing • Electronic forms processing • Document import processing • API • E-mail interface • Drag & drop application screen 	Process Initiation		R17	
Must provide a foundation for City-wide search.	Document Management	(Section 7.3.1)	R18	
Must be able to guide the users through the process of creation, editing, review, approval, retention policy assignment.	Content Management		R19	
Must support the enforcement of the City By-law and retention policies automatically. http://clkapps.winnipeg.ca/dmis/docext/ViewDoc.asp?DocumentTypeId=1&DocId=5220	Document Management		R20	
Must support enforcement of access controls mechanism automatically so that users can view relevant content that they have been granted specific access to, based on configured business rules.	Content Management		R21	
Must provide the ability for the workflow process to interact directly with database tables, allowing external data received to be used as part of a workflow process.	Document Management	(Section 7.3.2)	R22	
Must provide ability for the workflow process to interact directly with defined web services, allowing external data	Core BPM Requirement		R23	

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received to be used as part of a workflow process.				
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A. Mandatory Requirements				Proponent Response (Y, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Must provide the ability to update metadata of document in ECM repository from process event.	Core BPM Requirement		R24	
Must provide the ability to add document to ECM repository from process event.	Core BPM Requirement		R25	
Must enable to measure the health and usage of the ECM technology environment, such as service availability and downtime.	Operational Metrics	(Section 7.3.3)	R26	
Must be able to measure what are the service availability rates.	Service Availability		R27	
Must be able to measure and report downtime.	Service Availability		R28	
Must be able to measure the search time to produce results.	Search Retrieval		R29	
Must be able to measure how long it takes a user to start searching until they find what they want.	Performance		R30	
Must be able to measure the rate of adoption across the business process.	User adoption			R31
Must be able to measure the percent of available storage is used.	System Job Reports		R32	
Must be able to measure how many and which files were accessed weekly, monthly annually,	System Job Reports		R33	
Must display all of the associated information about a document right alongside the image itself – displaying index values, notes, related documents, revisions, discussion threads, and document history.	User Experience		R34	
Must support searching across multiple document classifications, including data from external sources.	User Experience		R35	
Must support solution’s search interface to accommodate multiple search methods from a single interface. This includes advanced search operators, full text searching, index value searches, searches against defined document types, all file formats, date ranges, etc.	User Experience		R36	
Must provide the ability for a user to filter	User Experience		R37	

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search result list by dragging and dropping attribute fields (index values).				
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A. Mandatory Requirements				Proponent Response (Y, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Must provide the ability for users to output search results to Excel, printer, email, or print-friendly format.	User Experience		R38	
Must allow for printing, or saving, of one or multiple documents from search results.	User Experience		R39	
Must support pick lists associated with metadata fields.	Metadata	(Section 7.5.2)	R40	
Must support varchar (string), date, float/currency, and numeric data types.	Metadata		R41	
Must support an unlimited number of document types.	Metadata		R42	
Must include a built-in viewer that allows for rendering of many different document formats in a single interface.	Viewer	(Section 7.5.2)	R43	
Must provide a viewer that support standard functionality such as rotate, sizing (fit width, fit height, fit window, zoom percentage).	Viewer		R44	
Solution viewer must support printing functionality.	Viewer		R45	
Must support annotations to be added via SDK or API.	Viewer		R46	
Must provide the ability to lock documents so other users cannot make modifications or delete document while locked.	Document Management	(Section 7.5.2)	R47	
Must provide the ability to version documents through Check-In and Check-Out functionality.	Document Management		R48	
Must control and track the modification of documents through multiple revisions, allowing users to view prior revisions and track document history.	Document Management		R49	
The solution must clearly display the number of revisions associated with a specific document.	Document Management		R50	
Must provide the ability to cut or copy pages from one document to another (TIFF images).	Document Management		R51	
Must distinguish between Admin records (where retention is based on the age of	Document Management		R52	

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the document) and Case records (where retention is triggered by a specific event – e.g. expiration of contract, termination of employment).				
A. Mandatory Requirements				Proponent Response (Y, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Must allow for the creation of document handling rules (DHR) that determine which documents are collected as declared records and how they are to be managed.	Document Management		R53	
Must allow for DHR variable substitution capability in order to simplify the creation of DHR for case files where large numbers of similar documents all require their own unique handling rule.	Document Management		R54	
Must provide the ability to email documents out of the system.	Document Management		R55	
Must provide integration with Microsoft Office products and Windows Explorer.	Document Management		R56	
Must allow for documents to be accessed by authorized from external locations (outside of the City network, not through VPN).	External Access		R57	
Must allow for documents to be shared selectively with external parties.	External Access		R58	
Must allow for documents to be uploaded to specified locations by external parties.	External Access		R59	
Must allow for publicly accessible links to be created so that internal documents may be shared via email.	External Access		R60	
Must support API input of documents.	Input	(Section 7.5.2)	R61	
Must support a security model with multiple levels of annotation security.	Security Model		R62	
Must support a security model that allows for access to create searches.	Security Model		R63	
Must support a security model that controls access to modify document metadata or content.	Security Model		R64	
Must provide the ability to import and export application configurations to ease migration of settings between environments.	Administration	(Section 7.5.2)	R65	
Must provide a single interface for the configuration and administration of all major system components (for example:	Administration		R66	

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application configuration, index value configuration, user groups and rights assignments, and storage structure).				
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A. Mandatory Requirements				Proponent Response (Y, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Must provide an export mechanism for mass-exporting of content in a non-proprietary format. This should supply both the document and the index values.	Storage	(Section 7.5.2)	R67	
Must store pointers in the database to file storage locations, as opposed to a BLOB in the database.	Storage		R68	
Must support means of migrating objects from one storage location to another.	Storage		R69	
Must support the ability to encrypt data at the database level and at the file storage level, as well as content that has been backed up/at rest.	Storage		R70	
Must have SDK or APIs for accessing and managing documents from external programs.	Integration	(Section 7.5.2)	R71	
Must have all Document Management Features including listing, full text indexing, metadata & templates, version control, drop spot, multiple workspace, pdf creation, optical character recognition (OCR), google docs, digital signature, barcode recognition and retention policies.	Integration		R72	
Must allow for custom tools to be built and added to product.	Integration		R73	
Must track user logins/logouts	Reporting	(Section 7.5.2)	R74	
Must track when documents are accessed by user.	Reporting		R75	
Must track when documents are deleted by user.	Reporting		R76	
Must track when documents are updated/modified by user.	Reporting		R77	
Must track when document metadata is updated/modified by user.	Reporting		R78	
Must track when a document is downloaded or emailed by user.	Reporting		R79	
Must support distributed capture and isolation of licenses by location and or AD Groups.	Infrastructure	(Section 7.5.3)	R80	
Must provide for administrative access	Security Model		R81	

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based on AD Group for setting up security for the rest of the security model.				
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A. Mandatory Requirements				Proponent Response (Y, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Must allow for the administrator to turn security on and off.	Security Model		R82	
Must support an API, capable of being used by Microsoft .Net languages, that allows for the automation of capture tasks.	Integration		R83	
Must support centralized administration of all capture processes with access controlled by AD Group membership.	Administration		R84	
Must support both scanning of paper documents and the importing of electronic format documents.	Functionality	(Section 7.5.3)	R85	
Must support the polling of a directory structure to import documents using the names of the folders and portions of the file name as index fields in the documents.	Functionality		R86	
Must support the use of image cleanup and enhancement technology to allow for improving image quality and resolution during the capture process.	Functionality		R87	
Must support the release of documents and meta data to multiple backend systems.	Functionality		R88	
Must support the development of additional release options using a provided API that can be implemented using Microsoft.Net languages.	Functionality		R89	
Must provide full auditing of the actions taken by each user during the capture process including all facets of the process including deletion of documents and batches of documents.	Functionality		R90	
Must support reporting on all facets of the Capture process by user and type of activity.	Reporting		R91	
Must allow e-mails and attachments to be automatically imported and fully indexed into the System without any user intervention or	Document Management	(Section 7.5.7)	R92	

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data entry.				
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A. Mandatory Requirements				Proponent Response (Y, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Must allow the user to access the ECM system's workflow processes from the e-mail client interface, with the ability to decision items (execute tasks) and view related documents directly from the e-mail message notification.	Email Integration to Workflow		R93	
Must provide the ability to search on e-mail index values and/or perform a full-text search on e-mail and attachment content.	Email Archive		R94	
Must support the capability to provide general Role Based Access Control.	System Permissions and Security	(Section 8.1)	R95	
Must support the capability to maintain confidentiality of documents and data between departments and business units.	System Permissions and Security		R96	
Must support the capability to use Active Directory (AD) as the primary authorization and authentication repository [single sign-on] and make use of the AD-defined users and groups.	System Permissions and Security		R97	
Must support the capability to administer security and access control at the group and individual user level. A user may be granted direct access through Active Directory AD [single sign-on], or through the use of a defined group.	System Permissions and Security		R98	
Must support the capability to have access to documents stored in the Cloud.	System Permissions and Security		R99	
Must support the capability to automatically provide audit, control, and record the identity of any user who accesses, views, alters, deletes, or uses solution information (e.g. IP address, MACID, user-id, timestamp, etc.).	System Permissions and Security		R100	
Must support the capability to ensure audit records cannot be updated or deleted.	System Permissions and Security		R101	

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A. Mandatory Requirements				Proponent Response (Y, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
<p>Must describe the system's security methodology (rights and privileges), including system's ability to assign security at each of the following levels:</p> <ul style="list-style-type: none"> • User groups • Users • Document Type Groups • Document Types • Index Values • Folders • Notes • Workflow • Import Processors • Scan Queues • Configuration 	Security Administration		R102	
Must describe the different security options for logging into the system.	Authentication	(Section 8.1)	R103	
Must send documents as an encrypted PDF.	Encryption		R104	
<p>Must allow designated users to perform the following administrative tasks via the web-based client:</p> <ul style="list-style-type: none"> • Add new users • Change passwords • Reset passwords • Apply rights to user groups 	Web Administration	(Section 9.1)	R105	
Must store documents in their original, native file formats, not in a proprietary format.	Storage Format	(Section 9.7)	R106	
Must contain an export tool for massive exporting of content in a non-proprietary format. This should supply both the document and the index values.	Export		R107	
Must allow users to check documents out of the system for access via a localized copy that can be worked on, checked back in, and processed automatically.	Off-line		R108	
The system's storage architecture must allow for documents and images to be stored at one to many different physical locations for the purpose of redundancy. If one of the locations were to have a failure, there would be no interruption of access to the documents.	Fail-Over / Redundancy		R109	

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A. Mandatory Requirements				Proponent Response (Y, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
System must offer both dedicated user and concurrent (pooled) client access licenses.	Licensing Flexibility	(Section 9.8)	R110	
Training options must include train-the-trainer technique within training offerings.	Training	(Section 9.9)	R111	
Training options must include web-enabled training courses and tutorials.	Training		R112	
Must describe the test and development Environments provided.	Training		R113	
Must have the capability for maintenance and support to be provided either by the City of Winnipeg internal resources or via external resources.	Support		R114	
Must support a service level agreement model involving the Proponent or outsourced third party, as may be required by the City of Winnipeg Management and Application Maintenance policies	Support		R115	
Must correctly implement the defined policies and standards by the City of Winnipeg.	Automation	(Section 7.1)	R116	
Must provide the capability for users to personalize the user experience (e.g., personalized homepage that opens to personal workflow lifecycles, stored favorite retrievals, etc.).	Client User Interface	(Section 7.2)	R117	
Must provide ability to display the document being indexed in a preview pane during the indexing process.	Client User Interface		R118	
Must support a hierarchical file plan /retention schedule that allows for the classification and disposition of records in accordance with the City By-law 86/2010	Records Management	(Section 9.2)	R119	
Must permit users to declare a document to be a record (locks it down and applies specific metadata to it, including classification and retention based on By-law 86/2010)	Records Management		R120	
Must support formal 3-stage process for disposition of records where records are qualified, made available for review and only destroyed after approval by designated authorities.	Records Management		R121	

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A. Mandatory Requirements				Proponent Response (Y, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Must Prevent the automated destruction of records as well as destruction outside the formal process.	Records Management		R122	
Must provide the ability to auto-import camera images and media files directly from a connected device.	Client User Interface		R123	
The Interface Must accommodate multiple search methods from a single panel. This includes advanced search operators, full text searching, text searching, searches against notes, index value searches, searches against defined document types, all file formats, date ranges, etc.	Search Experience		R124	
Must allow drag-and-drop import of messages into the ECM system using e-mail client folders in order to automate the classification and indexing of e-mails & attachments (e.g., a user could create a folder for POs, one for invoices, another for resumes, etc.).	Email Integration	(Section 7.5.7)	R125	
Must support single instance storage of both e-mail and attachments. For example, e-mails and attachments are only stored once in the E-mail Archive, with the sender and all recipients pointing to one record/file.	Email Archive		R126	
Must support the capability to ensure Disaster Recovery and Data Loss Prevention measures are in place, such as redundancy and back-ups, in order to avoid or minimize business disruption and data loss.	System Performance and Availability		R127	
Must support the capability to ensure the Records Management By-law No. 86/2010 is followed as per the Administrative Standard AS-006 Corporate Recordkeeping	Records Management	(Section 9.2)	R128	
Must support the capability to archive records based on City of Winnipeg records management policies.	Records Management		R129	

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B. Non-Mandatory Requirements				Proponent Response (Y, C, F, 3, N)
B1. General Requirements				
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Should enable users to play, stop, and pause multimedia files (audio/video) with the native viewer.	Client User Interface	(Section 7.2)	R130	
Should enable users to easily navigate and perform their primary job tasks with intuitive ribbon-style toolbars, tabs and easy access features that are based on the familiar look and feel of Microsoft Office products.	Client User Interface		R131	
Should offer full support for Internet Explorer and Mozilla Firefox browsers on Windows platforms as well as full support for Chrome, Mozilla Firefox and Safari browser on the Macintosh platform.	Web Client Interface		R132	
Should support ability for a user to filter a broad search result list by dragging and dropping attribute fields (index values).	Search Filtering		R133	
Should enable users to create their own personalized saved searches without the intervention of administrators.	Search Experience		R134	
Should provide the ability for meaningful document names to appear in a search results list that can contain both static text as well as defined index values, offering a more detailed description of the documents returned.	Search Experience		R135	
Should provide the ability to utilize full text searching alongside index value search.	Search Experience		R136	
Should support advanced full text search capabilities that include fuzzy, inflectional, thesaurus, proximity, wild card, and SOUNDEX. Search Experience.	Search Experience		R137	
Should provide the ability to not only retrieve and archive to the ECM system from the native office toolbar, but also search and retrieve ECM stored content from directly inside the native office application.	Search – Microsoft Office		R138	

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B. Non-Mandatory Requirements				Proponent Response (Y, C, F, 3, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Should provide the ability to automatically link related documents of similar or different file types to each other (e.g., a mainframe-generated text file to a TIFF image).	Retrieval		R139	
Should provide the ability to identify hot spots or zones that trigger multiple related documents from the primary document.	Retrieval		R140	
Should provide task buttons and user interaction on a menu from open documents through standard document retrieval (i.e. user does not need to enter the Workflow Client).	Integrated Workflow		R141	
Should enable automation of the business processes that span “cradle-to-grave” for the document/record lifecycle	Workflow	(Section 7.3)	R142	
Should allow user input to be created using an electronic form which allow one or two step workflow in order to maintain consistency in metadata, filing (taxonomy placement) and records management.	User Input		R143	
Should allow for the automatic distribution and sorting of work based on load balancing rules, including role, availability, percentage, order of arrival, index values, or the size of existing workloads for users, as well as custom-built work distribution rules.	Work Distribution	(Section 7.3)	R144	
Should create and publish Web content.	Content Management	(Section 7.3.1)	R145	
Should be able to notify users of new tasks or changes in the status of content in the process.	Document Management		R146	
Should allow for collaborative (simultaneous) editing of documents.	Document Management		R147	
Should be able to create documents from templates defined by metadata or workflow – that is, by virtue of a certain workflow being invoked or certain metadata being entered, the system should provide me with the correct template.	Document Management		R148	

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B. Non-Mandatory Requirements				Proponent Response (Y, C, F, 3, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Should enable users to setup and monitor the status of reports to track the progress of various processes and workflows.	Report		R149	
Should enable Managers to pull statistical data with reports from the system to measure metrics on process performance.	Metrics		R150	
Should support the measurement of declaration rates across the organization, broken down by department (% of emails and documents that are declared as records by users).	Records Management		R151	
Should enable measurement of classification accuracy rates across the organization, broken down by department (% of emails and documents declared as records that are accurately classified according to the organization's file plan).	Records Management		R152	
Should ensure the solution has Software Development Kit (SDK) or Application Program Interface (APIs) for accessing and managing documents from external programs.	Content Management	(Section 7.3.2)	R153	
Should allow for custom tools to be built and added to the product.	Document Management		R154	
Should enable the triggering of retention periods based on time, event or relationship requirements.	Records Management		R155	
Should support the management of physical records, including boxes, folders and artifacts.	Records Management		R156	
Should enable measurement of ECM-specific metrics such as search retrieval performance and storage utilization.	Operational Metrics	(Section 7.3.3)	R157	
Should enable measurement of the progress and performance of the overall ECM program, such as number of concurrent ECM projects, unit's costs for ECM shared services, adoption levels, and user satisfaction levels with the program.	Program Metrics		R158	

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B. Non-Mandatory Requirements				Proponent Response (Y, C, F, 3, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Should capture performance and usage metrics.	Workflow		R159	
Should provide reporting and statistics in flexible and intuitive displays.	Reporting	(Section 7.3.3)	R160	
Should review, retain and dispose of records.	Document Management		R161	
Should be able to measure how many business processes and applications are using the system.	Solution Usage		R162	
Should be able to measure the average time to deploy business solutions / processes.	Average Implementation Time		R163	
Should be able to measure the program satisfaction rates with clients for implementation times, communications, responsiveness, support, quality of resources.	Customer Satisfaction		R164	
Should provide the ability for users to personalize the user experience (e.g., personalized home page that opens to personal workflow lifecycles, stored favorite retrievals, etc.	User Experience	(Section 7.5.2)	R165	
Should provide Administrators with the ability to create static and dynamic searches using hidden fields, control lists, prompts, and joins with external data.	User Experience		R166	
Should provide advanced full text search capabilities that include AND, OR, NOT, NEAR, *, and FormsOf.	User Experience	(Section 7.5.2)	R167	
Should provide the ability to utilize full text searching alongside index value search.	User Experience	(Section 7.5.2)	R168	
Should offer hit highlighting for content retrieved from full text searching	User Experience		R169	
Should provide the ability to link disparate applications via equal values.	User Experience		R170	
Should provide the ability to link searches to external data via equal values.	User Experience		R171	
Should allow for custom metadata fields (index fields) to be applied to repositories (applications).	Metadata	(Section 7.5.2)	R172	

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B. Non-Mandatory Requirements				Proponent Response (Y, C, F, 3, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Should support modification of applications to add or remove metadata fields after creation.	Metadata		R173	
Should support update of metadata values for multiple documents at the same time.	Metadata		R174	
Viewer should support annotation functionality (text, lines, redactions, highlights, stamps, sticky notes).	Viewer		R175	
Should allow for control as to whether or not documents are printed with annotations.	Viewer		R176	
Should provide the ability to associate documents to other documents.	Document Management		R177	
Should support COLD ingestion and viewing.	Document Management		R178	
Should support user input of documents that control metadata input.	Input		R179	
Should support security model based on application and search access.	Security Model	(Section 7.5.2)	R180	
Should support a security model that controls create/write rights at an application level.	Security Model		R181	
Should support a security model that controls delete rights at an application level.	Security Model		R182	
Should support a security model that controls print rights at an application level.	Security Model		R183	
Should support a security model that controls download rights at an application level.	Security Model		R184	
Should support a security model that controls lock rights at an application level.	Security Model		R185	
Should support a security model that controls unlock rights at an application level.	Security Model		R186	
Should support a security model that controls annotation rights at an application level.	Security Model		R187	
Should support a granular annotation security model that allows for explicit access to things like redactions, stamps, text.	Security Model		R188	

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B. Non-Mandatory Requirements				Proponent Response (Y, C, F, 3, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Should allow for ease of configuration, in that most administrative tasks can be done by an internal resource as opposed to a third-party software expert.	Administration	(Section 7.5.2)	R189	
Should allow the archiving of documents to various media, including: Windows file servers, to allow the leveraging of Share and NTFS permissions.	Storage		R190	
Should provide means to store objects of disparate applications or repositories in separate physical locations.	Storage		R191	
Should support system-only access to storage location.	Storage		R192	
Should store documents in their original, native file formats, not in a proprietary format.	Storage		R193	
Should track when a document is printed by user.	Reporting	(Section 7.5.2)	R194	
Should track when annotations are added by user.	Reporting		R195	
Should track when annotations are updated/modified by user.	Reporting		R196	
Should track when user executes search.	Reporting		R197	
Should support multiple applications or web servers in a load balanced configuration for redundancy and scalability.	Infrastructure	(Section 7.5.3)	R198	
Should support controlling access to the categories of document being captured by AD Groups.	Security Model		R199	
Should support controlling access to the steps in the capture process so that some users can scan while others can do indexing.	Security Model		R200	
Should support an API that allows for extensions to be built in Microsoft .Net language.	Integration		R201	
Should support defining groups of documents that will be captured and the processes that will be used during the capture life cycle.	Functionality	(Section 7.5.3)	R202	

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B. Non-Mandatory Requirements				Proponent Response (Y, C, F, 3, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Should support the automated importing of documents using an index file with pointers to documents.	Functionality		R203	
Should support document separation using Patch Codes, Bar Codes, Fixed Page Count, Manual, and Forms Feature Recognition.	Functionality		R204	
Should support Forms Recognition based on Barcodes and other Forms Recognition techniques.	Functionality		R205	
Should support metadata field definitions that can be associated at the batch and or document level.	Functionality		R206	
Should support customization of the business logic for each field being capture on a document.	Functionality		R207	
Should support a set of events that are fired during the indexing process that allow for custom logic to be inserted when they occur.	Functionality		R208	
Should support database lookups that can be triggered from the various events that occur during the document indexing process.	Functionality		R209	
Should support page registration for zonal indexing.	Functionality		R210	
Should provide the ability for users to access an email in the archive directly from their client.	Email Archive		R211	
Should support the ability to provide full administrative control of roles, authorizations and access (e.g. access rights and assigning users to roles, allowing rights to be assignable at the individual user or group levels, etc.).	System Permissions and Security	(Section 8.1)	R212	
Should support the ability to provide full user administration functionality (i.e., user profile set, access and authorization, de-activation and re-activation).	System Permissions and Security		R213	

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B. Non-Mandatory Requirements				Proponent Response (Y, C, F, 3, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Should support the ability to provide granular control of access rights including but not limited to: "create", "read", "update", "delete" (CRUD) and printing.	System Permissions and Security		R214	
Should support the ability to recover users' username and password in situations where users have forgotten their username or password or both.	System Permissions and Security		R215	
Should support the ability to meet and support privacy provisions of The Freedom of Information and Protection of Privacy Act (FIPPA).	System Permissions and Security	(Section 8.1)	R216	
Should support the capability to provide a FIPPA coordinator [special access user] with the capacity to search the solution repository	System Permissions and Security		R217	
Should support the capability to hide/reveal functionality to the user based on security and authorization roles (internal and external).	System Permissions and Security		R218	
Should follow City of Winnipeg and industry security standards and best practices system installation and configuration of the solution.	System Permissions and Security		R219	
Should publish select content onto removable media (CD/DVD) in an encrypted format, allowing access to a self-contained / runtime version of the client.	Encryption	(Section 8.1)	R220	
Should support the capability to automatically provide audit of any user who accesses (or attempts to access) the Solution. The audit information includes, but is not limited to the credentials and a date and time, number of attempts.	System Permissions and Security		R221	
Should support the capability to encrypt all data at rest with industry recognized and proven cryptographic standards equal to or stronger than AES 256.	System Permissions and Security		R222	

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B. Non-Mandatory Requirements				Proponent Response (Y, C, F, 3, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Should support the capability to provide authorized users with Read-Only access to audit records via the solution user interface.	System Permissions and Security		R223	
Should support the capability to maintain effective access controls, particularly regarding the use of passwords.	Accessibility	(Section 9.1)	R224	
Should support the W3C Web Content Accessibility Guidelines to fulfill the Universal Design policy passed by The City of Winnipeg City Council and is implemented on the City Website.	Accessibility		R225	
Should support the capability to provide date/time-stamped audit trail of all system actions including but not limited to Create, Read, Update, and Delete.	Records Management		R226	
Should support the capability to enable data review, entry and edit via a user friendly interface.	Usability	(Section 9.3)	R227	
Should support the capability to search by defined solution data and metadata in the system.	Usability		R228	
Should support the capability to sort and filter lists of displayed data in the solution. [Column\heading sort and filter capabilities].	Usability		R229	
Should support the capability to customize filters/sorting based on user preferences.	Usability		R230	
Should support the capability to incorporate graphics (e.g., City of Winnipeg logo) on to templates, forms, etc.	Usability		R231	
Should support ease of navigation by minimizing the number of menu levels the user has to manually navigate through for functional use.	Usability		R232	
Should support ease of use by providing system functions and processes that are intuitive.	Usability		R233	
Should support user centric design that focuses on ease of use for non-technical users.	Usability		R234	

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B. Non-Mandatory Requirements				Proponent Response (Y, C, F, 3, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Should support the capability to provide the user interface via multiple screens with the capability to function on only one monitor if required.	Usability		R235	
Should support the capability to enable multiple resources to be able to access/view the documents in the system concurrently.	Usability		R236	
Should support compatibility with Apple iOS and Blackberry devices.	Usability		R237	
Should support the capability to store data on financial information held in the solution against the PeopleSoft General Ledger and sub-ledgers.	Integration	(Section 9.4)	R238	
Should support the capability to Import budget data from the Capital Budget process documents/artifacts.	Integration		R239	
Should support the capability to integrate with GIS platforms.	Integration		R240	
Should support the capability to integrate with the current procurement system.	Integration		R241	
Should support access for up to 10 concurrent users, with a maximum of 100 total users.	System Performance and Availability	(Section 9.5)	R242	
Should support the capability to scale to business, and employee loads of 30 concurrent users, with a maximum of 100 total users.	System Performance and Availability		R243	
Should support an estimated storage capacity increase of 2TB per year as project and electronic content grows and not cause degradation in system response. [This estimate is based on the solution supporting 1000 projects of various complexities. Storage capacity requirements will start low and gradually increase as the City of Winnipeg transitions all departments onto the solution.].	System Performance and Availability		R244	
Should support the capability to provide a system response time of less than 3 seconds for 95% of system requests.	System Performance and Availability		R245	

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B. Non-Mandatory Requirements				Proponent Response (Y, C, F, 3, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
Should support the capability to provide a system report response time of less than 5 seconds for 95% of system reports.	System Performance and Availability		R246	
Should use a file storage system to store documents, as opposed to storing directly into the database.	Image Storage		R247	
Should support the capability to provide thin-client, web-based access from standard web browsers (i.e., Internet Explorer 8.0 or higher, Chrome, Firefox, and Safari).	Technology	(Section 9.6)	R248	
Should support the capability to operate on Microsoft Windows Server environment used at the City of Winnipeg.	Technology		R249	
Should support the capability to operate on Microsoft IIS Web Server.	Technology		R250	
Should support the capability to use an Oracle or SQL Server database.	Technology		R251	
Should support the capability to alter solution functions and capabilities via configuration of parameters.	Technology		R252	
Should support the capability to access internal corporate and departmental templates via an intranet link.	Technology		R253	
Should support the capability to hyperlink to internet sites for external documents.	Technology		R254	
Should support compatibility with business intelligence tools such as Cognos.	Technology		R255	

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B. Non-Mandatory Requirements				Proponent Response (Y, C, F, 3, N)
Requirement Description	Requirement Category	ECM Requirements Analysis Section#	RFQ Requirement Ref#	
<p>Should allow the archiving of documents to various media, including:</p> <ul style="list-style-type: none"> • Windows file servers, to allow the leveraging • of Share and NTFS permissions • Linux file servers • Unix file servers • Integrate with IBM Tivoli Storage Management • Integrate with EMC Centera • NetApp • Plasmon Archive Appliances • CD, DVD or Blu-ray 	Storage Option	(Section 9.7)	R256	
Should support the capability to provide product training and knowledge transfer during the implementation & transition phases to the City of Winnipeg internal resources.	Support Training		R257	
Should support the capability to provide on-going maintenance and support.	Support		R258	
Should support the capability to provide knowledge transfer to City of Winnipeg internal operational support resources on an ongoing basis, as required by the City of Winnipeg.	Support		R259	
Should support the capability to provide a dedicated phone number for IT technical support.	Support		R260	
Should support the capability to provide operational support documentation that can be transferred back to the City of Winnipeg Internal Resource group when the project is completed.	Support		R261	