



Canada's Tournament Capital

## **City of Kamloops**

**REQUEST FOR PROPOSAL - GroupWise Email / Oracle UCM/URM  
Integration**

**Reference No. P6-10**

**Issue Date: 2010 April 9**

**Closing Date: 2010 April 28**

**CITY OF KAMLOOPS  
REQUEST FOR PROPOSAL NO. P6-10  
GroupWise Email / Oracle UCM Integration**

**1.0 SUMMARY OF REQUIREMENT**

The City of Kamloops requires an integration between the GroupWise email system (Version 8.01 HP 1) and the Oracle UCM (Universal Content Management) system. The integration must expose UCM containers (Contribution Folders, and Collaboration Projects) within the GroupWise folder list to allow drag and drop of messages, attachments, tasks, and calendar items into the UCM. GroupWise messages, attachments, tasks, and calendar items will hereafter be referred to collectively as GroupWise items.

1.1 The integration between GroupWise and the Oracle UCM must support the following business rules:

- Users will be required to file messages and their associated attachments into UCM within a specified number of days of receipt/creation. Any older content will be destroyed via a global rule run by GroupWise administration. No email archiving system will be deployed.
- GroupWise items are to be filed into the UCM file container appropriate to their business purpose. Note: These file containers must be created within UCM in advance in order to appear in the email client folder view.
- GroupWise items filed into UCM are not considered "archived"; they are active content until UCM actions make them otherwise.

1.2 References

In addition to the list of requirements in Scope of Work (section 6) proponents must provide at least three references applicable to a GroupWise-ECM integration. Preference will be given to references showing experience with GroupWise and Oracle UCM integrations.

1.3 Time Frame

To be eligible, completed proposals must be submitted to:

City of Kamloops  
Public Works Centre  
Attention: Purchasing Division  
955 Concordia Way  
Kamloops BC V2C 6V3

and received by 2:00 pm Pacific Standard Time on 2010 April 28 .

## 2.0 GENERAL INFORMATION AND INSTRUCTIONS TO BIDDERS

Proposals, rather than tenders, have been requested in order to afford the proponents a more flexible opportunity to employ their expertise and innovation and thereby satisfy the City's needs in a more cost-effective manner. Proposals should be based on these instructions and the attached project requirements.

### 2.1 Errors, Omissions, Clarifications

All questions and requests for clarification relating to the Request for Proposal process and/or identification of any errors or omissions in the Request for Proposal documents shall be directed to Mr. Joe Dickenson, Buyer, 250-828-3504, or in writing via fax 250-828-3390, or via email to [jdickenson@kamloops.ca](mailto:jdickenson@kamloops.ca).

All requests for technical information or to clarify specifications shall be addressed to Mr Scott Redgrove, City of Kamloops Records Manager, 250-828-3363 or via email [sredgrove@kamloops.ca](mailto:sredgrove@kamloops.ca).

### 2.2 Good Business Clause

Contractors, consultants, and suppliers wishing to do business with the City of Kamloops agree to resolve any differences through the City of Kamloops dispute resolution procedure. Contractors, consultants, and suppliers who choose to use a public forum to air any differences run the risk of being removed from the preferred vendor list and may be prevented from doing future business with the City of Kamloops.

### 2.3 Proposal Submissions

Two signed and sealed copies of each proposal shall be submitted. Each copy shall be complete and unabridged and shall not refer to any of the other copies for additional information, clarification, or details. Sealed proposals clearly marked with the proposal number and project title shall be delivered to the reception counter, at the Central Maintenance Yard office, Attention: Purchasing Division, 955 Concordia Way, Kamloops, BC, V2C 6V3 until 2:00 pm Pacific Standard Time on the closing date.

The City of Kamloops will not be held liable for any costs incurred in the preparation of this proposal.

**The City of Kamloops requests you do not include with your submission 3-ring binders, excess brochures, packaging, or other items not specifically requested that could potentially impact our environment.**

### 2.4 Proposal Contents

All proposals shall provide all detailed information as requested in the RFP document. Failure to be fully responsive in accordance with the RFP request for all detailed information may result in rejection of a proposal without further consideration by the City of Kamloops.

## 2.5 Late Proposals

Late proposals will not be accepted and will be returned to the proponent.

## 2.6 Signed Proposals

The proposal must be signed by a person authorized to sign on behalf of the contractor binding the contractor to statements made in response to this Request for Proposal.

## 2.7 Proposal Validity

Proposals will be open for acceptance for at least 90 days after closing date.

## 2.8 Firm Pricing

Prices will be firm for the entire contract unless the Request for Proposal specifically states otherwise.

## 2.9 Irrevocability of Proposals

By submission of a clear and detailed written notice, the contractor may amend or withdraw its proposal prior to closing date and time. Upon closing time, all proposals become irrevocable. By submission of a proposal, the contractor agrees that should the proposal be successful, the contractor will enter into a contract with the City.

## 2.10 *Freedom of Information and Protection of Privacy Act*

The City is subject to the provisions of the *Freedom of Information and Protection of Privacy Act*. As a result, while the Act offers some protection for third party business interests, the City cannot guarantee that any information provided to the City can be held in confidence.

## 3.0 **PROPOSAL EVALUATION AND SELECTION PROCESS**

### 3.1 Proposal Opening

All proposals will be opened in public at 2:01 pm Pacific Standard Time by the Purchasing Division, 955 Concordia Way, Kamloops, BC, on the same day as the deadline for RFP responses.

### 3.2 Proposal Evaluation

All proposals will be initially evaluated by a staff Evaluation Committee to assess the qualifications and capabilities of bidders to meet the minimum standards specified in the RFP.

Throughout the evaluation process, the City, at its sole discretion, may request additional written clarifications and/or supplemental information from selected bidders as part of the initial evaluation process.

### 3.3 Non-compliance with RFP Requirements

Unless explicitly stated in the proposal, all proposals shall be assumed by the City to be in full compliance with the RFP requirements without exception.

All items in the proposal that are not in full compliance, or that vary from the specific RFP requirements, shall be clearly identified in the proposal as non-compliant and/or variances, and shall include specific reference to the precise nature of the variances of non-compliance. Non-compliance or variation from the specific RFP requirements will not necessarily result in rejection of a proposal. The acceptance or rejection of all non-compliant items and/or variances to the RFP requirements shall be at the sole discretion of the City without any obligation by the City to either request clarification or enter into detailed discussions or negotiations with the bidder(s).

### 3.4 The lowest or any proposal not necessarily accepted.

The City of Kamloops reserves the right to accept any proposal in whole or in part unless otherwise stipulated.

## 4.0 **CONTRACT AWARD/RIGHT TO TERMINATE**

- 4.1 The acceptance of the Owner of proposals submitted by the proponents under the Request for Proposals is an invitation by the Owner to proponents to enter into negotiations for a contract and evinces the Owner's intention to consider proposals and, if it wishes in its sole discretion, to enter into negotiations with one or more of the proponents.
- 4.2 The Owner reserves the right to negotiate with the respective proponents any portion of any proposal received by the Owner.
- 4.3 The Owner, in its absolute and sole discretion, and according to its own judgment of its best interest, having regard for the greatest value that can be obtained on overall quality, service, and price, reserves the full right to reject any or all proposals or alternative proposals for any reason whatsoever and continue negotiations with one or more of the other proponents.
- 4.4 The Owner shall not be liable under any circumstances for a proponent's cost in preparing a proposal.
- 4.5 The Owner retains a separate right to waive irregularities of a minor or technical nature. This right does not in any way waive the requirement of the proponents to submit a proposal in proper form as required by the proposal documents.
- 4.6 If the Owner at its absolute and sole discretion determines that it wishes to enter into a written contract or agreement with a proponent, the Owner will notify the successful proponent, in writing, by way of a notice of acceptance.
- 4.7 In the event that a single proposal is received, the Owner may open the proposal without further notice to any party.

- 4.8 The owner reserves the right to reject any proposals from a proponent that is, or whose principals or partners are, at the time of closing of proposals, engaged in litigation against the Owner.
- 4.9 Notice of award will be posted on the City's website, [www.kamloops.ca/purchasing](http://www.kamloops.ca/purchasing).
- 4.10 The City of Kamloops reserves the right to terminate this contract at its sole and absolute discretion upon 30 days written notice, and the service provider will have no rights or claims against the City.

## 5.0 ENVIRONMENTAL CONSIDERATIONS

The City of Kamloops will consider offers on products, projects and services that are Environmentally Preferred.

The City recognizes that procurement decisions by its employees can make a difference in pursuit of improving environmental performance and as such support the purchase of products, projects, and services that will minimize the negative impact on the environment when they are practical and can be obtained at a reasonable cost.

Definitions:

Environmentally Preferred products, projects, and services are those that have a lesser impact on human health and the environment when compared with competing products, projects, and services. This comparison may consider raw materials acquisition (materials that are abundant in nature, natural and biodegradable, organically grown, fast growing, and sustainably harvested), production and manufacturing (energy efficient, the use of renewable energy or efficiently used materials), packaging, distribution, re-use (from recycled content or a recyclable material), operation, maintenance and disposal options for the product, project, or service. Environmentally preferred products, projects, and services will have third party certification acceptable to the City of Kamloops.

Practical means the products, projects, and services can perform the intended function as well as the products, projects, or services made from virgin materials and the cost of the Environmentally Preferred products, projects, and service reasonably approximates the cost of the products, projects, and services made from virgin products. Reasonable cost may require a Life Cycle Cost Analysis of the product, project, or service.

## 6.0 SCOPE OF WORK

- 6.1 UCM containers may be created from within GroupWise, but they must be profiled to ensure they are mapped to a valid Records Schedule identified within URM (Universal Records Manager). Cloning an existing container may be an option to remove the need for file creation within UCM/URM.
- 6.2 Messages and their attachments dropped into UCM containers must be moved, not copied, into the UCM.

- 6.3 All GroupWise items dropped into the UCM must retain their functionality by type (e.g. message, calendar item, task etc) allowing users to launch the GroupWise client from UCM by clicking on the item.
- 6.4 All GroupWise item links (e.g. between messages and their attachments) must be preserved after filing into UCM.
- 6.5 It must be possible for users to choose to separate attachments from a message and file message and attachment(s) separately (links must be maintained).
- 6.6 GroupWise message metadata must be mapped to UCM metadata (as per US DoD 5015.2 ver 3):
- The e-mail name and address of sender is mapped to the Author/Originator profile field;
  - The e-mail name and address of all addressees (or distribution list) is mapped to the Addressee profile field;
  - The date and time that the message was sent is mapped to the Document Creation Date profile field;
  - The subject of the message is mapped to the Subject profile field;
  - The subject of the message is also mapped to the Title field for the content item as it will appear in UCM, but the title field must remain editable for users to clarify inappropriate or meaningless titles as taken from the Subject;
  - For messages that have been received, the date and time that the message was received is mapped to the Document Creation Date profile field; and
  - Captures and automatically stores the transmission and receipt data as part of the record profile when an email message is filed as a record.
- 6.7 Messages and attachments dropped into the UCM must remain visible within GroupWise through the exposed UCM container.
- 6.8 Any content forming part of a UCM container must be visible in the details list from the exposed UCM container in GroupWise.
- 6.9 Some messages and attachments require a more detailed profile before filing into the UCM. This may be accomplished by requiring the user to fill out a custom profile form, or by flagging the items dropped as being profile incomplete. The profile incomplete flag should appear as a column in the details pane within the GroupWise client.
- 6.10 GroupWise must expose only those UCM containers to which the user has appropriate rights as defined within UCM.
- 6.11 GroupWise Calendar items should be supported via drag-drop as per messages and attachments. Fields should be mapped to UCM fields.
- 6.12 GroupWise Tasks should be supported via drag-drop as per messages and attachments. Fields should be mapped to UCM fields.

- 6.13 UCM Containers exposed in GroupWise are considered "files" in the sense of the term used in the business, legal, government, and medical domains. The file is considered Open (and hence available for content) until a specified period of time has elapsed (for Annual Files) or until a user has clicked a "Close File" button (for Case Files). Porting the manual "Close File" capability over to the GroupWise system is highly desirable. It should be possible to remove any closed file from view within GroupWise. This view capability should be under central administrative control.
- 6.14 It should be possible for GroupWise rules to be exploited to automatically move incoming messages and their attachments to UCM folders, and alert the user that an un-read message etc exists in the UCM folder.
- 6.15 Exposing both UCM and URM folders is highly desirable, but UCM Contribution Folders and Collaboration Projects must be exposed at a minimum.
- 6.16 The message composition window must provide the ability to attach a native file from Content Server repository.
- 6.17 The message composition window must provide the ability to link to a file within the Content Server Repository.
- 6.18 Messages moved to UCM must be written in the .eml format.

**7.0 VENDOR SELECTION**

**7.1 Selection Criteria**

- Responsiveness to proposal call 10 points
- Pricing 20 points
- Functional Requirements 50 points
- References (especially Oracle UCM and GroupWise) 20 points

**8.0 CLOSING DATE**

Proposals clearly marked P6-10, "GroupWise / UCM Integration", will be accepted up to and including 2:00 pm local time on 2010 April 28 at the Public Works Centre, Attention: Purchasing Division, 955 Concordia Way, Kamloops, BC, V2C 6V3. Proposals received after the closing time and date will be returned unopened.

---

J. Dickenson, CPPB  
Purchasing Coordinator

JMD/lm